



National Society of IT Service Providers (NSITSP) Association Management Report

Presented for the February 26, 2024 Board Meeting

The following provides a high-level management report on the current month's activities conducted by Bolder Strategies as well as indicates upcoming activities.

Executive Management Services	
Bolder Strategies will assign an Executive Director who will provide oversight for the management team	<ul style="list-style-type: none"> Nicole Singleton Norman continues to provide executive oversight for NSITSP Nicole Singleton Norman or a Bolder Strategies representative participates in each committee meeting Provided suggested workflow and timeline for strategic planning for NSITSP's President's consideration on 12/26/2023 – Bolder Strategies has <u>not</u> received a response to this communication at the time of this report; A new email was sent 2/25/2024
Actively participate in board meetings	<ul style="list-style-type: none"> Participated in January board meeting Provided documents for the board meeting Sent draft agenda to NSITSP President for input Agenda sent to NSITSP board upon receipt of feedback from NSITSP President
Represent NSITSP as the key contact for all operational needs of the organization	<ul style="list-style-type: none"> Manage all inbound emails for NSITSP
Collaborate with the Board of Directors to ensure that the organization is fulfilling its mission.	<ul style="list-style-type: none"> Actively participate in committee meetings to ensure committees are working to fulfill their charges Requested that committee chairs ensure meeting minutes are posted on NSITSP website – some minutes are still missing Reminder emails have been sent to committee chairs to request that meeting minutes be posted

Provide regular updates to the Board of Directors regarding the organization's operations and performance.	<ul style="list-style-type: none"> Presented management report as an update Provided monthly financial statements Provided membership reports
Work with the Board of Directors to develop and implement policies and procedures that support the organization's mission and goals.	<ul style="list-style-type: none"> Created in October 2023 the 2024 Budget for NSITSP, which was approved by the Board in November 2023 2024 Budget has been posted in QuickBooks
Board of Directors Meeting	
Prepare Executive Report and Agenda	<ul style="list-style-type: none"> Presented management report as an update to the full NSITSP board Emailed NSITSP draft agenda for input from the NSITSP President Agenda posted to NSITSP Website and emailed to board and committee chairs
Financial Management	
General Bookkeeping Processing of Accounts Payable and Receivable Follow-up on Accounts Receivable Balancing Bank, Stripe and PayPal Merchant accounts Preparation and dissemination of financial reports to Finance Committee and Board of Directors	<ul style="list-style-type: none"> NSITSP January 2024 financial reports have been completed Set up Siteworks for monthly payments from new account
Budget Preparation – with the Finance Committee	<ul style="list-style-type: none"> Completed in October 2023 Approved by NSITSP Board November 2023 Posted in QuickBooks IOnline
Membership	
Database management - Convert from current MemberPress web site	<ul style="list-style-type: none"> Bolder Strategies continues to manage membership database in MemberPress It was determined by Board and Finance Committee that NSITSP is not in the financial position to transition to a more robust association management platform – pricing for this has been shared
Renewal processing (mostly auto-payments). Members are automatically re-billed on anniversary date.	<ul style="list-style-type: none"> Reviewed membership notifications as they come into email account Assist NSITSP members as needed
New member packets. Assemble and mail.	<ul style="list-style-type: none"> Bolder Strategies manages the distribution of new member packets
Recruitment	<ul style="list-style-type: none"> Bolder Strategies continues to encourage free members to convert membership via email campaigns Bolder Strategies uses social media to encourage members to join at the professional level
Attend committee meetings (four committees – generally six meetings per month)	<ul style="list-style-type: none"> Bolder Strategies continues to participate in committee meetings Bolder Strategies has encouraged committee chairs to participate in future board meetings to provide their own reports

	<ul style="list-style-type: none"> • Bolder Strategies sends reminders to committee chairs to post meeting minutes on NSITSP website • Committee chairs have been encouraged to use the recently developed committee report template – In February, the Finance Committee submitted its report in a timely manner
Prep/Execute quarterly all-member meetings - Process meeting recording, etc. This includes embedding the recording in our web site along with transcription and chat. Also post on YouTube and promote on social media.	<ul style="list-style-type: none"> • Planned and participated in Q1 All-Member Meeting • Posted Q1 All-Member Meeting video to the NSITSP website
Create and disseminate materials to be used at channel events	<ul style="list-style-type: none"> • Bolder Strategies shipped materials to Amy Babinchak for a recent booth exhibit • All exhibit booth materials are in the possession of volunteer leaders
Marketing	
Maintain a “big list” of channel events. Contact organizers to see if we can get a table. Coordinate members to sit at tables/booths.	<ul style="list-style-type: none"> • A list of 2024 channel events has been created for board review and input
Produce videos and marketing funnels as needed to attract more members	<ul style="list-style-type: none"> • Bolder Strategies is requesting input from the Marketing Committee on suggestions for NSITSP’s target market • No direction from the Board or marketing committee has been provided for this service—various committees have indicated that they will create videos within their committees
Marketing	
Marketing/Social Media Presence. Regular posts across Facebook, LinkedIn, and Twitter. Occasional posts to YouTube.	<ul style="list-style-type: none"> • Bolder Strategies continues to post on social media, monitor engagement, and respond as needed • Promoted February programming via email and social media (webinars, Legislative Q&A, etc.) • Bolder Strategies is following its Q1 social media calendar for NSITSP • Past month’s metrics from HootSuite have been provided to the NSITSP Board
Blogging / posting news. About 4-6 times/month.	<ul style="list-style-type: none"> • Bolder Strategies was advised that the blogs will continue to come from the volunteer leaders – These were to come from Amy and Karl and other committee chairs
Manage Client’s online Forums (very lightly used)	<ul style="list-style-type: none"> • Bolder Strategies needs assistance in understanding the NSITSP online forums and what is needed

	<ul style="list-style-type: none"> • We have been advised that this is a low priority item
--	---

Upcoming Activities:

- Ensure website updates are being made – make changes as needed
- Bolder Strategies will continue outreach to existing “free” members via email campaign and promoting to prospective members via social media
- Promote upcoming March 2024 programming via email and social media (webinars, Legislative Q&A, etc.)
- Determine which firm is to do the submission of the Form 990 for NSITSP