



THE CENTER FOR  
**ASSOCIATION  
RESOURCES**

INNOVATION • PASSION • RESULTS

# Comprehensive Management Proposal

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National Society of IT Service Providers



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## About the Center for Association Resources

The Center for Association Resources, founded in 1997, is a mid-sized AMC-accredited association management company serving organizations of all sizes from our headquarters in suburban Chicago and our offices in Washington, DC.



The Center is a nationally acclaimed association management firm that provides comprehensive leadership and management services to trade associations, professional societies, certification organizations and philanthropic organizations.

We listen to our clients, customize services, and go the extra mile to help our clients attain their missions with excellence and at great value. We have the talent, expertise, and desire to provide you outstanding service, including Full Service Management, Outsourced Management Solutions, and Consulting Services. We have over 25 years of experience serving the needs of our clients to their satisfaction. We are proud of our ability to provide each individual client with whatever services will best serve the needs of their members. To that end, we can offer one time services or complete association management including administrative, financial, governance, membership growth and maintenance, certification management, Executive Director, meeting planning, technology, print and electronic and social publications, marketing, government relations, education and accreditation.



### Competitive Edge

*We have the depth of experience and breadth of skills necessary to critically assess a process, generate original ideas, and drive innovation. Through ongoing assessment, a focus on operational efficiency, and a relentless attention to detail, we work diligently to improve performance and achieve your success. We are fully committed to developing solid performance-based client relationships that deliver results. Our company structure provides the most cost-effective and efficient services to meet your organizational goals, from providing leadership at the strategic level to efficiency at the implementation level.*

### Accreditation

The Center for Association Resources is a full accredited member of the Association Management Company Institute (AMCI). The Center is also a member of the Association Forum of Chicago, and the American Society of Association Executives.



AMCI accreditation demonstrates our investment in time and resources to ensure that we will deliver the highest level of customer service. We passed an independent audit that verified that our association management processes and procedures meet or exceed the baseline requirements. Accreditation means you can be assured that we will demonstrate a high level of professionalism and responsibility.

The Center accredited by the Better Business Bureau and maintains its highest rating of A+.



## Operations and Structure

Our company operates as a series of high-performance teams where collaboration is the key to effectively serving our clients. Our group consists of talented thinkers with extensive, multi-disciplinary expertise. Our structure is designed to assist clients in promoting value to members through continuity, consistency, purpose and strength. We hire excellent employees as needed to meet the needs of our clients. Our Hoffman Estates, IL headquarters provides offices and storage for clients all within easy transportation distance of air and auto. We have supported clients ranging from 250 members to 7500 members.



Our experience is that most have similar needs, whether small or large: responsive administration, focus on member needs, current technology, effective networking, effective communication and increasing revenues.

## Diversity

The Center's staff embodies a wide array of backgrounds, individual world views, diverse ethnicities, and social frameworks. We recognize and embrace these inherent differences, as this is what makes our employees a unique asset to our client organizations. To be successful, we understand and accept the ever-changing, complex, workforce dynamic existing in today's marketplace.

Employees collectively create a corporate culture where no employee should be expected to change his or her nature to fit into an organization. The Center recognizes that diversity is not just a word ... it is lived, and we are dedicated to nurturing this unique culture.

## Mission

Our mission is to apply our experience, passion for excellence, and commitment in assisting our client organizations to achieve their goals.

## Our Vision

**During the next five years, The Center will continually enhance, as part of our core values, our steadfast commitment to the highest level of personalized client service while using current and emerging best practice models as our guide. Our pragmatic and honest approach will enable us to serve our clients with creativity, efficiency and expertise. We passionately believe our work with our clients is a vibrant**



partnership, that we can learn from our clients, and incorporate excellence that benefits them directly.



Our key priorities and focus areas during the next five years include constant evolution of our technology and processes to achieve the best and most current opportunities to serve our clients. Our continual learning and critical thinking will move our clients to the “next level,” as we efficiently and effectively manage and grow their organizations both in size and in influence on behalf of their industry.

The Center fosters a dynamic and diverse culture that builds and rewards excellence, thoughtfulness and responsibility. We intend to continue to build our firm through hiring and humility towards each other and towards our clients.

*As an AMCI-accredited firm we welcome the challenges that will lie ahead.* Through innovation and creativity, we believe our dedication to create sustainable and measurable excellence will allow both our clients and our firm to continue to flourish!

## NSITSP Business Situation



As a very newly formed professional association, the achievements thus far are impressive. The members are active and increasing, the financials are growing, the goals and mission are clear and expanding, and the future looks extremely promising. With numerous state and national legislatures and the news and constant challenges currently focusing on this industry, the growth should be exponential. **Planned awareness is the key to further growth, and the social media tools and free membership should encourage this. Guidelines and knowledgeable spokespeople on legislation would also be helpful.**

As expected from an association of IT professionals, the dynamic website is frankly one of the best seen for an association. It is easily read and navigated, has relevant resources (like blogs and social media graphics to share), and is informative and appealing as well.

While no strategic plans have been developed yet, the numerous goals are very clear in both the section on Legislation & Regulation and the listed future near and long term projects. However, prioritizing them will be important and difficult, as all are valuable.

There are four obvious obstacles that face this new society. 1) This is such a prevalent business of often small companies and individual proprietors in different industries that reaching potential members could be challenging. 2) The conflict between many affected industries, as so well explained on the website, may be almost impossible to reconcile in some cases. The unity of the profession will be tested as these industries struggle to have their contradictory needs met. 3) The professionalism is just starting to be recognized. Just as with anything new, initial inroads are a tough road. 4) While self-awareness of the skills most professionals will or will not have is a good start, the typical skills will need to be expanded. (From the website: “Whether it’s cybersecurity, reporting requirements, or right to repair, our voice needs to be heard. We need to take a seat at the table and participate wherever our industry is being discussed. These are not the “skills” technical people normally bring to the job. But they are the skills needed to move the industry forward.”) Additionally, this is also not the typical skill set of people that will reach out to potential

members to grow the Society. Association leadership has been known to help develop some of these skills but it is not a panacea.

*The Board is to be commended for the strategic vision to realize that professional association management is the key to accomplishing the goals and mission of NSITSP. A strong society requires good, experienced management as well as insightful leadership. The Center has a record of providing robust, supportive and active successful management. By solidly partnering with a mid-sized association management company like The Center for Association Resources with experience with professional societies, the unique needs and interests of NSITSP can be met. We also provide strategic planning as a service at no additional charge to all new clients.*

## Our Pledge to You

- We pledge to help you maintain and build an even stronger organization.
- We will seek long term opportunities, increase your organization's value, build awareness, and achieve goals.
- We will work within your budget and follow your directives.
- We will communicate well and often, answer questions quickly and accurately, successfully manage daily operations, and provide your organization with outstanding service.
- We will be attentive to all your needs, deliver the highest quality work, and always meet deadlines.



## We can help!

We welcome the opportunity to help shape NSITSP for the future. We have all the functions needed to fulfill your Scope of Services. Please see the Scope of Services section to see the many ways we will support you through full-service management.



Thank you for the opportunity to present our proposal. We look forward to talking to you and learning more about NSITSP, supporting your vision and strategic direction, and being an instrumental part in achieving your full potential!

## **Scope of Services**

The Center will be a solid and passionate partner serving your needs in all the requested areas. We are able to support the complete scope of services requested in your RFP. If some aspect is missing from our proposal, please ask us.

### **General Office**

The Center for Association Resources manages your organization with a team experienced in providing a complete portfolio of services from our headquarters office, conveniently located in the Chicago area in Hoffman Estates, just a short drive from busy O'Hare Airport, and our Washington D.C. office, a short walk from the White House. We provide a mailing address and a physical presence in a suburban top tier, "Class A" professional and secure commercial office building with a fully equipped conference center.

A dedicated Executive Director will work in close collaboration with the leadership team of NSITSP. The various needs of NSITSP will be managed by one dedicated person who will oversee and direct the expertise of the specialized skills and different pay scales of staff in database management, accounting, marketing, membership, meeting planning, information technology and website management for the smooth, effective operation of NSITSP. A cost advantage of a mid-sized AMC is that as staff is required for projects, the teams of marketing and communication, financial, conference and meeting planning, educational, technology and any others needed will be available, but have the flexibility to complete other projects for other organizations when the workflow of NSITSP allows. Any staff is always available as needed. This reduces expenses while providing needed staff on demand.

Our Member Care Servicer answers calls on a dedicated telephone line, in your name, Monday through Friday from 8:30 a.m. to 5:00 p.m. Central Time, excluding federal holidays. After hours a voice mail system is accessed. Calls with the members, volunteer leaders and sponsors and vendors are scheduled or answered as received. We provide personalized email addresses for all staff and a general email box. We respond to all your calls, mail, voice mail, e-mail, and fax communication. Details of passwords, logins and other crucial information is kept safe and confidential along with the membership database and files. We refer appropriate inquiries to the appropriate NSITSP volunteer. The administration and promotion of NSITSP will take place from our headquarters with staff managing mailings and emails as required. Our technology typically includes restricted and private virtual technology tools for communication among BoD, committees and other selected groups. Reports are run and issued as preferred. Storage of physical materials are held in our secure storage facilities.

While most associations share some similar functions and requirements, The Center understands that each one is unique. The needs and preferences of NSITSP will be followed, in budgets, policies, and communications for your organization. We acquire, maintain and review the documents essential to your organization, including bylaws, Articles of Incorporation, copyrights, records and other administrative documents. We ensure legal compliance with state and federal laws, preparing mandated taxes, filings, reports, and audits. Our meeting and financial departments are experienced in negotiation and reviewing all contracts, depending on the content. The Center has outside reliable and ready legal and audit teams to consult for legal advice and audit services. Our marketing team manages the communications in collaboration with others and the voting process is managed by the Executive Director in coordination with the President.

### **Board of Directors Meetings and Committee Meetings**

The Board and other volunteer committees keep your organization moving forward by implementing new initiatives, investigating, nominating, collaborating, referring and fundraising. We provide strategic board support and management services to assist your leadership with all aspects of governance as well as provide administrative support. The Center has worked with many Boards and can provide coaching on best practices.



We are an active and working member of the NSITSP Board, attending Board and Quarterly Meetings, sharing our expertise, and helping NSITSP attain key objectives. We help onboard new Board members, review policies such as ethics and conflict of interest, and help your Board perform a self-assessment. We ensure communication between board and committees and staff by scheduling meetings, drafting agendas, sharing Board meeting agendas in advance, conference or video call setup, preparation of executive reports, disseminating minutes and implementation of directives and coordinating with the volunteers on reports. Timelines, benchmarking, research, and reporting tools are provided as appropriate for structure, continuity, and information. We keep the Board current with policies, website updates, nominations, voting and required forms. Our websites can accommodate secure, restricted access electronic communications.



We can arrange travel and hotel logistics, as well as food and beverage, for in-person Board meetings. We will follow your procedures in submissions for payment. The Center will work closely with the Board to implement procedures and programs. The management of The Center will be as visible and supportive as the association prefers at all Board and committee meetings.

Most members are not aware of the challenges of running a nonprofit organization. We are very practiced at working with volunteers and committees. The Center has guided many chairs with best practices. We can manage as much or little of the processes of coordinating the various committees as they prefer. We can train and guide committee leadership to provide a strong foundation for good business posture. We facilitate communications among the committees, with the members and to the BoD.



We provide financial, membership and other reports as requested. Our meeting planning department will work closely with the meeting planning committee. We collaborate with the nominations committee to nominate and arrange voting for new Board members. We team up with the awards committee to ensure any awards are available on time to be distributed and accurately record the names of the winners. We maintain current rosters of the committee members. We can provide conference call or video call meeting lines if needed. We offer a secure, private virtual communication platform, with access based on the committee rosters.

## Financial Management

The NSITSP Board understands the ability to achieve strategic objectives and effectively serve the members is dependent on the ability to make sound, data-driven decisions and the accuracy of your financials. From budgeting through accounts receivable and payable, we ensure security, accuracy, transparency, and compliance. This management service includes all the typical financial needs of an organization utilizing standard financial software. In all financial action, we follow the procedures and preferences of the organization and get approvals as requested.

The Center will issue timely invoices and record and deposit income for member dues, annual meeting registrations, sponsors and other revenue sources and pay all bills with approval of the Treasurer or President. We will monitor and reconcile checking, savings, travel reimbursements, merchant and investment accounts, receipts as well as review and manage vendor agreements and performance. We work with you and the bank to make sure account signatories are current. We can process checks, credit cards, cash, PayPal and as new formats become prevalent, we will add those capabilities. The Center manages and issues reports on member dues, program and event registrations.

The Center provides monthly, quarterly and annual financial statements prepared in accordance with Generally Accepted Accounting Principles (GAAP) and monthly reports on income and expense budget performance as part of a package of reports delivered to and reviewed with your leadership. We analyze your financial statements and make recommendations to improve your bottom line.

The Center will work with NSITSP to prepare an annual budget with noted assumptions, manage the budget with project sub-budgeted accounts as needed, report budget-to-actual results, and analyze variances. We develop forecasts as a management tool and future view of your organization. We use standard software that is easily accessed by the Board.

We maintain and review your documents. The Bylaws and policies and procedures are documented and followed and submitted to the appropriate authorities, within or outside the association. We collaborate with the outside auditors, insurance agents and legal experts when necessary to prepare state and federal tax returns, audits, insurance policies, and comply with IRS policies. We refer and prepare documents for an outside auditor. We follow the preferences of NSITSP to negotiate and execute contracts.

With a professional investment planner, your organization gets advice on how to decide and when to invest your money. We help you manage your investments by discussing short and long-term cash needs and your current financial picture. Using cash flow assessments and operating ratios, appropriate levels of reserves, and investment options suitable for non-profit organizations we help you make appropriate decisions.

We can meet regularly with the Finance committee, sending reminders, supplying the reports and taking minutes.

## **Membership**

Membership recruitment and maintenance is a crucial resource of a successful association management company. Loyal members support the organization not only with dues but with meeting attendance, donations, provision of educational opportunities and volunteers. While every organization is unique, we do have over 25 years of experiences working with a wide range of societies. Sharing our expertise on what has been successful for others is one way to benefit your association.

We combine advanced technology, best practices, and a talented staff to serve your membership efficiently and effectively. The Center includes the marketing strategy and implementation of tactics to attract, retain, and engage members as well as the daily activities of maintaining and correcting your membership database, responding promptly to member inquiries, maintaining and updating membership materials and welcoming new members, processing membership dues, and sending applications, renewals and new member packets.

We would work closely with the membership committee to enhance the membership proposition. We process dues and renewals, provide reports based on subcategories, and manage member communication to all or segments of members. Referrals are proven the most effective approach to increasing membership, and the process would be carefully managed. An active roster of potential new members will be maintained.

Organizations are better positioned to grow by attracting new members if they demonstrate consistent adherence to their mission while delivering ongoing value to their members. Both tangible benefits such as education, online member directory, research and awards, and intangible benefits such as networking, peer group collaboration, and mentoring are ways we deliver value to your members.

The ability of NSITSP to grow the membership is a function of the perceived value it delivers, as well as its reputation, and the image it promotes. Awareness of NSITSP should be increased through an active integrated communication platform that delivers across social media formats. (More on this under social media). By providing insight and thought leadership, and by delivering greater value to your members, NSITSP will be positioned to attract new members.

We develop a year-round membership strategy with separate tactics for different segments of your membership including:

- A well-designed onboarding strategy.
- Frequent year-round communication that engages members.
- Mailings for renewals and as desired.
- Early and frequent renewal contacts including autorenewal.
- Membership surveys so you know what your members value and why they belong.
- Answers to “What have you done for me lately?” before members have a chance to ask.
- Easy one-click renewals and automatic membership renewals when appropriate.
- Tracking member participation in programs and committees with seamless linkages to the database.

Our lapsed member process is based on a strong retention process and the belief that the best way to win back members is to never have lost them at all. We have a standard process that has been highly successful.

The key lapsed member steps are:

- Set a cutoff point where the member is considered lapsed rather than late in renewal.
- Remove those you know have retired, changed industries, etc.
- Ensure that the lapsed member is not receiving more for free than was intended.
- Conduct an exit interview or send a survey and try to win the member back.
- Use a personal connection, such as a Board member, to personally call them, ask them why they left, and address their response.
- Reconnect after a year to let them know what they are missing.
- Look for trends in reasons for leaving.

### ***Database Management***

Websites are crucial to all organizations. The Center manages the content, updates and permissions. We manage all your website technology needs including domain registration, website hosting and maintenance, secure data storage, ecommerce, technology updates, online membership directory, website ad solicitation, and search engine optimization. Included services also cover designing website pages, writing and soliciting content, providing domain name email

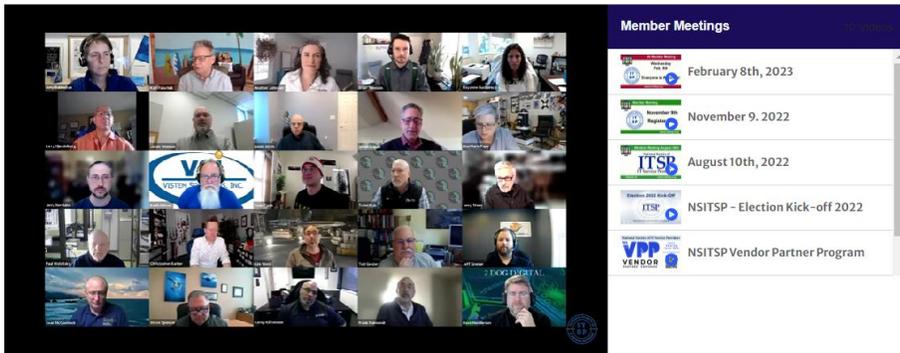
addresses, blogging, receiving payments that Link directly to the database, and monitoring Google analytics. We provide a secure server to host your website. We reply to inquiries from the website. We offer proactive social media expertise and SEO analysis. Separate secure password protected sites can be maintained for the Board or other committees and other protected organization documents. Public access sites can be maintained to share the purpose, goals and other information.

The Center has experience with database migration to link to the website for secure processing of payments for dues, donations, meeting registration, store, advertising, and any other ecommerce. We can help convert the database from the current MemberPress website.

*Quarterly Meetings and Other Online Opportunities*

Education and networking are core values and commitments for most organizations. Member surveys often show a primary reason people join an association and remain members is to build their knowledge and network or share their expertise with others. We have experience with online meetings and education, interactive training, video and webinar development. The Center provides interactive media and technology support for meetings, promotional videos, webinars and automated online education and in interactive training utilizing cutting edge technology. The Center has successfully delivered many online or virtual educational events including meetings, training, workshops, webinars, eLearning, seminars, promotions and conferences. This could be useful for onboarding new Board or committee members as well.

We have experience with webinar development. We know how to assess member needs, develop an education strategy, find speakers that will educate and energize, provide logistical and onsite support, develop and administer certification programs, manage continuing education credits, develop and analyze post-event surveys, and market the events. This is a revenue stream for some professional associations.



We have a meeting department devoted to planning successful meetings. The Center offers comprehensive event management with skilled staff that specialize in taking care of all the details for events, in-person or virtually. We are highly skilled in complex meetings

and event management, both large and small, domestically and internationally, in person and virtually. We are experienced in the administration of successful events, from hosting on Zoom, managing attendance, communicating details of the event in advance, and satisfying attendees. Our meeting staff will participate and can coordinate these meetings.

All the steps to care for attendees, prepare meeting materials, conference evaluations, and communication with registrants are expertly done. The timetable is planned well in advance to enable participation. Graphic design is performed by our experts in house and is provided at no additional charge. Keeping the leadership and members informed is crucial to a successful event.

We handle all aspects of sponsorship sales and management, including determining feasibility, marketing, and payment. Costs can add up quickly. Obtaining sponsorships from key partners for events and education can make the difference in achieving the financial organizational goals. We have a process from developing a sponsor profile through using a sponsor champion that not only attracts but helps retain sponsors. Sponsorship strategies that strengthen relationships with current exhibitors and sponsors, as well as build new relationships and increase sponsors, may help achieve future growth initiatives. We know how to treat the sponsors well so they return year after year. This includes prompt responses to any inquiries and prominent and frequent recognition for events in numerous formats.

Staff are available to host or handle any last minute issues and problem solve during the meeting. We run conferences like the proverbial “well-oiled machine.” We know what needs to be done and execute tasks with excellence. If the unexpected does happen, The Center has the flexibility, resourcefulness, and experience to solve any problem as quickly as possible and minimize its impact.

After the meeting, we will process and disseminate the meeting materials, as appropriate, to the website, YouTube and other social media.

We look forward to helping NSITSP grow!!

## Marketing

**Marketing begins with an understanding of the members’ needs. This is the first stage of the sales funnel. We would like to learn more about NSITSP in terms of any member needs assessments and potential new benefits to increase membership.** We are highly adept at survey research and provide cost-effective, highly customized assistance to organizations seeking added knowledge about their constituents. Our customized member needs assessment can pinpoint any areas that need modification. We use membership surveys, online surveys, focus groups and individual interviews to gain a thorough understanding of what benefits and services members want from your organization. The knowledge gained is used to prioritize actions to increase the value of membership. This is especially true for a newly formed organization in multiple industries.

Our marketing team is ready to help define and communicate your brand identity and membership needs based on members and stakeholders needs. Developing messaging that resonates with NSITSP’s target audience will be a critical component of the communications calendar. We will review the annual marketing and promotions plan before implementation and monthly to utilize all communication vehicles to advantage. We will then use multi-channel marketing tactics, including social media, to communicate that value to prospects and members so they will join and renew their membership and participate in additional educational opportunities with NSITSP. Our marketing plan will help target new members and provide compelling reasons for them to join.

Collaborating with other relevant big list channel events is a tried and true marketing tactic, if the other organizations are willing to collaborate and provide a table. This may require budgeting expenses in some cases. Coordinating members to represent the organization is the most successful approach with member enthusiasm permeating the conversation.

As discussed above under membership, we offer expertise in membership recruitment and retention. As discussed above under *Quarterly Meetings and Other Online Opportunities* we are

able to develop, script, and record videos for promotion. For this target audience, this is the right approach.

## Social Media and Marketing

Social media is useful for attracting new members, publicizing NSITSP to the public, marketing the annual conferences, and showcasing the members' successes. We create a dynamic social media presence and enhance brand visibility, engage members, attract new members, and position your organization as an industry leader. Elements of the social media strategy include goals, audience, metrics, competition, engaging content, platforms, and timing. Accuracy of information is paramount for reputation and reliance. Content is shared on a timely basis on appropriate social media (Facebook, LinkedIn, Twitter, YouTube) in coordination with the desires of the leadership. To reach this desired audience, the need for social media posts in all formats is expected.

## Publications Support Services

Communications are an important part of association management. The monthly email newsletter and materials produced by committees markets the news of the association's accomplishments and



activities. This management service covers all communications including updating website content, the online resources, newsletters, press releases, social media, brochures, ads, certificates and flyers, as well as other needed communications. We have experience in all aspects of publishing, including serving as editor, contacting and managing authors, and maintaining timelines with all relevant parties, graphic design and

delivery. Content is shared on a timely basis on appropriate media. Graphic design and editing are performed by our experts in house and are provided at no additional charge.

The Center works with you to develop and deliver your monthly Newsletter and website in support of your goals and objectives. We have expertise in content marketing - creating relevant and valuable content to attract, acquire, and engage a clearly defined audience with the objective of driving profitable customer action. Insightful communication is a key driver of membership growth and retention. Benefits include:

- Improved member loyalty
- Increased sense of belonging
- Better understanding of benefits
- Increased member engagement
- Increased brand awareness
- Connecting with members throughout the year
- Showing appreciation
- Heightened visibility

We develop and reinforce your brand identity, so you connect more authentically with your audience, have a style that is recognizable and memorable, and create trust and loyalty between you and your members and the public. We ensure your brand is integrated through all your marketing including:

- Logo: The most visible and consistent representation of your non-profit organization
- Colors: Influence feelings and perceptions about your brand
- Voice: Your voice is the "sound" of your non-profit organization
- Tagline: What is unique and different about your non-profit organization
- Messaging: How you communicate in brochures, web copy, social media
- Fonts: Reflect brand personality
- Images: Should match and complement messaging



Digital, PR, writing, design, web updates, social media, PR monitoring and analysis is provided in-house. We collaborate on budget, marketing approach and final format with the appropriate persons. We will project manage, attain copyright permissions, edit, layout, publish and distribute your public facing media (press releases, social media posts) and member facing communications (eblasts). We create and format content according to your style before sending it to up-to-date email or mail lists. We maintain an up to date mailing list for the publications as well as a database of potential new members, advertisers, sponsors and partners for receiving communications which we track as they become actual members, advertisers, sponsors and partners.

## Technology

We use technology to make processes easier, faster, and more accurate. The Center uses cutting edge technology for:

- The development and content management of client websites.
- Developing and maintaining an online member directory.
- Providing a membership payment system.
- Enabling secure and easy meeting registration with automatic updates to the database.
- Online voting.
- Committee communication sites based on committee member rosters.
- Streaming video education delivery system.
- Online education and testing.
- Video production.
- Membership database with secure connection to payment options, volunteer opportunities and activity tracking.
- Financial reports.
- Publication management system.
- Online meetings.

Our redundant in-house secure server environment hosts client websites, member databases, conference registration systems, and integrated accounting systems. We invest in all the necessary resources to make our clients successful and to assure a positive member experience.

A disaster can be anything that puts your operations at risk, from a cyberattack to an equipment failure to a natural disaster or pandemic. Our goal is for NSITSP to continue operating as close to normal as possible.

We have a triple redundant backup in place which includes the following resources.

- Dual duplicate servers on location in real-time
- Daily cloud based back up (We can download to any location in event of a disaster)
- Secondary cloud back up

Robust technology facilitates member acquisition, retention and engagement. We streamline processes and deliver high tech educational opportunities. There may be additional charges for third party services.

## Certification & Accreditation Programs

Although you do not have certification or accreditation programs, if this is something you decide you are interested in pursuing, we can help. We have established both certification and accreditation programs and we administer those processes. We develop and manage well-designed credentialing programs that can make a positive impact on your association's revenue, add member value, and increase member engagement. We send renewals and process payments if the applicants qualify. We work with relevant committees to maintain the question bank. We manage the online testing site and process. We deploy real time credentials for the online training systems to streamline the delivery of course completion and certification for CEs. This includes digital certificates for training and certification credentials.



We can help set the goals, determine market demand, estimate use of resources, develop the program framework, delivery framework, curriculum, testing, pricing, tracking, marketing, credentialing process, and maintenance process. Once implemented, we manage the training schedule, administer testing, collect fees, provide certificates, and manage renewals. Whether it is the certification of individuals or the accreditation of programs, we have extensive experience and can help and guide you through every step in the process.

## Insurance

The Center's accounting department will arrange for insurance policy audits and acquire the necessary policies, act as a liaison for legal advice and services, and arrange for an annual financial audit or balance sheet review (as required).

We have reliable industry contacts and present options to the Board to provide the appropriate Board of Directors insurance needed for Errors and Omissions Insurance, liability insurance and meeting insurance. We can arrange insurance with our industry contacts as needed from the insurance audits.



## Strategic Planning

Strategic Planning is a core strength of The Center. The strategic planning process identifies where the organization is now and what resources it currently possesses. The process determines where the organization wants to be and the necessary steps to achieve those goals. The member needs assessment is helpful in determining the desired directions. NSITSP will be taken from its current state to its desired future state. (There is no additional charge for this for our new clients).



Results of a strategic planning process are made actionable by setting them into functional steps in the yearly operations plan. All steps that have a financial component are added to the operating budget. A flexible and accepted strategic plan linked to the current budget is the organization's blueprint for success. Without it, an organization may change direction monthly with the well-intended, loudest voice in the room. With a strategic plan, the entire Board has been heard, buys in, and understands the strategic direction so all are working to keep your organization on course.

The outcome of the strategic planning process is a clearer vision of the steps to take to achieve desired results. This would help with the stated long term goals.

## Non-Dues Revenue

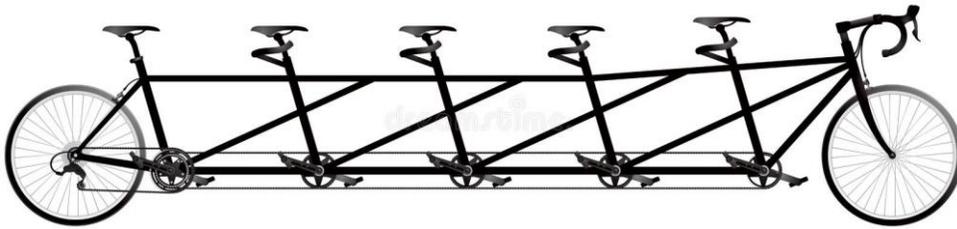
There are many opportunities to generate non-dues revenue including additional meetings, webinars, merchandise, education, sponsorships, exhibits and advertising. We help you to assess which opportunities will yield the greatest additional return on investment and effort and support your strategic plan and increase those initiatives for your target audience.



While we are able to advise and supply resources including referrals, the leadership ultimately is responsible for all decision making.

## Annual Review

The Center has a standard practice of putting in place a conceptual agreement with all new clients prior to starting any work once The Center has been selected to support the association. This agreement in concept that carefully identifies the objectives, measures and values of our work together. Objectives are the goals to be accomplished. Measures are the indicators of success along the way – how do we know we are making progress. The values are the impacts of meeting the objectives identified.



This process is not a checklist. It is a discussion, a conversation where the association leaders identify its objectives and goals, measures

and values. This is a place where we can better understand each other, build trust and share best practices.

With the establishment of this Annual Review process, we can assure that NSITSP is successful and The Center and NSITSP are meeting the expectations.

## **Case Studies**

In Appendix IV, our case study describes how we incorporated process redesign skills and technology to streamline a certification process and enhance effectiveness and revenue. In Appendix V, our client's expansion of online training grew both non-dues revenue and membership.

## **Staff Introductions**

Our team members are dependable, intelligent, responsive, and naturally curious. Each professional team member possesses many years of strategic expertise, offering their insight into leadership, constituents, and internal teams. Our backgrounds are based in non-profit and commercial business management.

We seek professionals on all levels that have humility, are helpful, and who are genuinely interested in the work and vision of our clients. Our team members have the desire and ability to solve issues with creativity and enthusiasm.

The staffing process is so important that we want you to meet with our capable and caring staff to ensure your comfort and confidence in our expertise. Your team will consist of an Executive Director, a Meeting Planner, a Membership Coordinator, and administrative support. Additional staff will be added as needed and Rob Patterson is always available for consultation.

### **Robert O. Patterson, JD, Founder and CEO**

With over 29 years of experience in association and private sector management, Rob Patterson has served as a senior executive in the healthcare, housing, financial, and real estate industries. As the founder and principal of The Center for Association Resources, Rob provides clients with an array of services including executive management, strategic planning, marketing research and assessment, fundraising, organizational development, and public policy advocacy.



Prior to forming The Center, Rob orchestrated the operational, financial and programmatic turnaround of multiple associations and led the charge to redistribute sales tax monies in multiple states to non-profit retirement communities and Arizona residents. Rob's non-profit advocacy work has achieved national recognition.

Rob is an active member in several professional associations including the American Society of Association Executives, the Association Forum of Chicagoland, and the Illinois Society of Association Executives. He received a BA in Economics and Political Science from Gustavus Adolphus College in St. Peter, MN. He went on to complete his law degree at Chicago-Kent Law School, receiving a Juris Doctor degree.

## **Donn Lesko, Senior Association Executive**

Donn brings significant experience working with multiple associations. He has a strong and multifaceted background in IT, web design, graphic art, financial reporting, budget forecasting, electronic media, and SEO marketing.



Donn Lesko gained his association experience as the Administrative Director for one of the largest international medical associations, The American Association of Physicians of Indian Origin (AAPI). During his tenure at AAPI, he acquired an array of skills that were used to grow the organizations membership, meeting attendance, non-dues revenue, and overall organizational infrastructure. Donn was promoted to Associate Director soon after joining AAPI.

As the association's Associate Director, he managed the bookkeeping, financial reporting, IT department, and human resources. Donn implemented and customized a new online registration system which increased membership attendance to the annual convention raising revenue over fifteen percent. He designed AAPI's first electronic newsletter to reach out to the Young Physicians membership resulting in greater participation and application into the parent organization. He also served as the liaison to the Executive Committee, Board of Trustees and several ad-hoc committees.

Donn brings a diverse and broad range of knowledge to The Center for Association Resources and its clients. He is always researching and engaging new and creative resources to grow and advance business operations. (See Appendix V for just one example of how Donn helps his clients.)

## **Karen Gonzalez, Account Manager**

Karen has worked in the mortgage industry, insurance sales and service, and property management. Karen excels at communication skills, embraces challenge, and is a strong team player who has earned the respect of her clients, leadership, and colleagues.



As an Account Manager for our association clients, Karen has used her marketing and language skills to:

- Double the number of courses offered in Canada in just six months through targeted marketing.
- Steadily grow both new and renewed memberships by improving both the messaging and frequency of communications.
- Increase the number of international and overall attendees at annual conferences by effective promotions in both English and Spanish,
- Successfully convince a steady flow of lapsed members to rejoin by analyzing data and reaching out to them through multiple channels.

## **Adrianna Borczyk, Program Manager**

Adrianna Borczyk is an enthusiastic and results-orientated Program Manager at The Center for Association Resources, where she leads the certification program for one of The Center's

prestigious clients. Adrianna has worked on multiple projects including exhibits, conferences, and awards.



At the Center, Adrianna has demonstrated a solid understanding of multiple membership processes, database management software, and multilayered certification programs. She is skilled in program coordination, technology, problem solving, and process management. Adrianna designed a new procedure to handle membership and certification applications, which increased the organization’s overall certification total by 30%. (See Appendix IV – that’s Adrianna’s success story!)

Adrianna developed her strong analytical abilities and leadership skills managing high priority projects while working at the Polish Consulate and the Polish American Chamber of Commerce. She is an experienced program coordinator in the international business industry.

Adrianna has a bachelor’s degree in International Relations from the University of Warsaw. She attended the International Exchange Program of Northeastern Illinois University (NEIU) in Chicago where she obtained her master’s degree in International Relations.

### **Kari Levine, Meetings/Program Manager**

Kari graduated from American University with a BA Political Science and a minor in International Marketing. Working for two different Medical Education companies in Chicago and New York for over 7 years, she managed Speaker Training Meetings, CME Satellite Symposiums, Roundtables, Advisory Boards and Dinner Meetings. Before apps and QR codes were the norm, we were among the first med ed companies teaching physicians through interactive websites and CD Roms as well as in person. She was involved in all aspects of each meeting including speaker liaison, venue procurement, meeting materials, execution and onsite management.

Since its inception in 2011, she has organized, planned and managed all aspects of the Chicago Arthroplasty Alumni Foundation Annual Meeting. Responsibilities include but are not limited to meeting and event planning, meeting materials, program books and CME approval for 60-90 Rush Alumni, orthopaedic surgeons and their guests. Additionally, I cultivated relationships with orthopaedic specific vendors to create surgeon interactive sponsorship and exhibit opportunities. I have always exhibited strong time management skills completing projects within budget while meeting or exceeding quality and deadlines.

I moved to Chicago 14 years ago and live in the western suburbs with my husband and our two kids. Our daughter is currently a sophomore at Purdue University and our son is a junior at York High School. I have my husband to thank for introducing me to the medical education world as we have been together through his medical school, residency, fellowship and practice.

### **Krystle Ansay, Marketing and Member Services**

Krystle creates and executes comprehensive marketing plans for The Center’s clients and oversees association operations and customer service. She is dedicated to exceeding expectations. She quickly identifies growth opportunities and develops innovative solutions to challenges. Seeing projects succeed and watching the organization grow as a result is what motivates her.



Krystle has a history of being an integral part in helping organizations grow. Before joining The Center, Krystle played an integral part in helping the solar company business grow from its initial startup. Creating new marketing opportunities, increasing efficiency, and delivering superior customer service were the keys to her success. While serving for Little People of America, Krystle helped the LPA Chicagoland chapter grow and increased event attendance by over 40%.

Krystle holds a B.S. degree in Imaging Media with minors in art and journalism from the University of Wisconsin-Platteville.

### **Additional Client Support Staff**

Our permanent staff includes executive directors, account managers, meeting and event managers, member services coordinators, bookkeepers, administrative assistants, and information technology support. We are pleased to create the best account team from among our associates to meet your requirements.

## **Fee Schedule**

### **Billing**

**Our fee is \$5,500 per month or \$66,000 annually.**

### **Exclusions**

Our all-inclusive annual professional services fee excludes certain operating expenses such as office supplies and conference materials procured especially for NSITSP. Exclusions include all outsourced services including audit, tax preparation, printing, mailing, security at meetings, travel expenditures, psychometrician, and any other outside professionals or services. Exclusions also include providing technology other than what we provide as a basic standard, such as a specifically desired online program book or meeting app. Exclusions are documented in the Services section.

### **Inclusions**

Graphic design is performed in house through our experts and all is provided at no additional charge.

### **Contract Terms**

We suggest a minimum initial contract term of two years.

### **Transition Fees**

Transition services are estimated to be \$N/C.

### **Invoice Mark-ups**

There is *no mark-up* (margin) of any kind on any expenses incurred. We do not distribute monthly overhead costs proportionally across our client set, a practice that is common among association management companies. This practice causes budgeting difficulties for associations because such costs are not within the control of the association. This includes remitting hotel commissions to your organization.

### **Alternative Services**

We will negotiate a different fee in the event that only a subset of services is required. If additional services mentioned in this proposal are desired, now or in the future, we will submit a quote for your consideration.

# Appendix I: How Should I Choose an AMC?

FACTOR	THE CENTER FOR ASSOCIATION RESOURCES
Experience and Stability	Comprehensive, nationally acclaimed expertise since 1997; see client list and testimonials
Expertise in your area of focus	Health Care, Scientific, Legal, Professional Services, Trade Associations
Staff Biographies	We have the best, brightest and most experienced; see staff biographies
Services Offered	Everything needed for a thriving non-profit organization; services that support your membership growth and financial stability
Geographic Location	Located a short distance from Chicago's O'Hare Airport and in Washington DC for Government Affairs
Client Mix	No conflict of interest, variety of sizes and types
Technology	Expertise in Membership Databases, Financial Software, Event Registration, Abstract Software, Webinars, Websites, Social Media
Proposal	Comprehensive descriptions, offers services that support your goals, demonstrates it would be honored to manage your non-profit organization
Office Facilities	Attractive Venue, Meeting Facilities, Storage Space
Memberships	Fully accredited member of the Association Management Company Institute, the Association Forum of Chicago, and the American Society of Association Executives
Accreditations	<p>There are thousands of AMCs and only a few percent are AMC Institute Accredited.</p> 
Price	Very competitive; great return on investment

## **Appendix II: Client Testimonials**

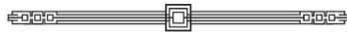
Our clients include Professional Societies, Trade Associations, Medical and Healthcare Organizations, Scientific Societies, and Legal and Bar Associations.

*“The Center has raised the professional appearance of our industry and turned a financially struggling organization into one with a positive cash flow. The Center’s team has been invaluable in providing the needs of our membership through email and phone inquiries, working with state organizations to set up more than 20 NAWT training sessions each year around the country, organizing and facilitating our presence at two national conferences each year, and planning one specialty symposium for our members that is held about every second year.*

*As Secretary of NAWT for more than twenty years, I find our organization is in the best position it has been to support our members going forward. I attribute this to the team at The Center for Association Resources.”*

Tom Ferrero

Secretary, National Association of Wastewater Technicians [www.nawt.org](http://www.nawt.org)



“We have been working with The Center for Association Resources for over seventeen years, and these are great people who have been highly responsive and supportive of our Society’s diverse and emerging needs. They are very skilled in administrative, financial, and technology areas; but, beyond that, we have found them to be remarkably creative, adaptable, and committed to functioning as part of our team. Thanks for the opportunity to endorse your team!”

Mal Gilbert, Past President

Society of Wetland Scientists Professional Certification Program



“The staff at The Center for Association Resources always provides proactive and creative service to me in my role as AACP’s Credentialing Chair. As volunteer leaders, we not only have to provide stewardship to our members but run our busy dental practices as well. The Center for Association Resources’ staff keenly understands the challenges that volunteer leadership faces and responds swiftly and carefully to my needs with great skill and insight.”

Jeanne K. Bailey, DDS, Chair, Credentialing Committee  
American Academy of Craniofacial Pain

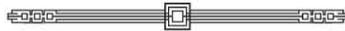


“The American Academy of Craniofacial Pain was founded in 1985 by 14 dentists. For many years, we were served by a small Central Office but, as the Academy grew to nearly 800 members, we realized help was needed from a source with greater organizational skills. The selection of The Center for Association Resources to function as our new Executive Office was

fortuitous, as the synergy has been excellent. The multitudinous situations that require expertise beyond the Officers and Directors' knowledge have been handled in expert fashion. The staff has been of great help with managing the burgeoning business of serving the membership.

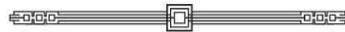
I can personally say that The Center has been extremely efficient in molding the AACP into a 21<sup>st</sup> century organization – the two organizations are a great match.”

Jack L. Haden, DDS, Past President and Founding Member  
American Academy of Craniofacial Pain



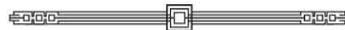
“As the president of a busy, state-wide bar association, I depend upon The Center for Association Resources' talented and responsive staff to attend to our association's administrative needs. I was pleased with our account representative's dedication and professionalism throughout the bar year in planning our luncheons, seminars, receptions and Board meetings. The Center for Association Resources also handled our daily membership needs through both our website and through consistent and courteous telephone service. Also, the accounting support has been thorough and timely.”

Jean M. Prendergast, Past President and Attorney at Law  
Appellate Lawyers Association  
Schuyler, Roche & Crisham, PC



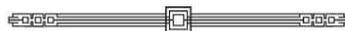
“The Center for Association Resources thoroughly understands the non-profit environment and is very easy to work with. On a scale of one to five, we give them the highest score possible – a five! Key recommendations generated as a result of our market intelligence activities have now become an integral part of our various committee work plans. For the first time, our Board is able to make decisions and plans based on member information...our return on investment was significant. It was worth much more to our association than hiring a research firm to conduct a single survey for us. The Center for Association Resources' recommendations are insightful and spot-on, and we look forward to working with them again.”

Charles Fenstermaker, Director of Marketing and Membership  
Clinical Laboratory Management Association



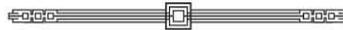
“The Center for Association Resources provided valuable guidance for our Board as they began a strategic transformation. The information and insight they provided offers our Board a reference point for their continued journey. We refer to these materials regularly as we continue to redefine the Board's work.”

Celeste G. Kirschner, Executive Director  
Illinois Physical Therapy Association



“I would like to thank Rob and his staff at The Center for Association Resources for a job extremely well done on our organizational assessment project. After several years of intense growth and change, we wanted to review our position, both internally with our staff and externally with our customers. The Center for Association Resources helped us put a finger on the pulse of the situation. They interviewed our managers, supervisors and line level staff and conducted field visits to key customer accounts. Armed with the data they expertly collected, their evaluation and recommendations helped us immeasurably in moving the organization forward.

Jay Huffman, Chairman and CEO (former)  
Multiple Listing Service of Northern Illinois, Inc.



“The Center for Association Resources did an outstanding job in helping us refine our mission, connect with our membership, and set a strategic vision for our organization as we became an independent, self-sustaining entity. On behalf of the Board of the International Personnel Assessment Council, I recommend the services of The Center for Association resources and appreciate their expertise, professionalism, and responsiveness as well as their consultative approach to their clients.”

Julia Bayless, President  
International Personnel Assessment Council

## ***Appendix III: Selected Current and Previous Clients***



The Center for Association Resources has a rich history of providing clients with outstanding association management and consulting services. Through client satisfaction and achievement of results, these clients (full management and project-based) attest to the value of our services.

### **Medical / Healthcare Organizations**

- American Academy of Orthopaedic Surgeons
- American Board of Podiatric Surgery
- American Dental Association
- American Hospital Association
- American Society of Dermatologic Surgery
- American Society of Neuroradiology
- Association of Community Mental Health Agencies of Illinois
- Clinical Laboratory Management Association
- Health Data Consortium
- Illinois Physical Therapy Association
- International Society of Arthroscopy, Knee Surgery and Orthopaedic Sports Medicine
- National Family Planning & Reproductive Health Association
- Outpatient Endovascular and Interventional Society
- Society of Gastrointestinal Endoscopic Surgeons
- Special Care Dentistry Association
- Southeastern Council on Optometry-SECO

### **Legal/Bar Associations**

- Illinois Judges Association
- Illinois State Bar Association

### **Professional Societies**

- American Society for Training and Development
- Conference of Consulting Actuaries
- Council of Smaller Enterprises
- Illinois CPA Society
- International Association for Jazz Education

- International Game Developers Association
- International Neural Network Society
- Literacy Research Association
- Mississippi Association of Realtors
- Multiple Listing Service of Northern Illinois
- Society of Wetland Scientists Professional Certification Program
- Porsche Club of America, Inc.
- Property Casualty Insurers of America
- Public Library Association
- Realtor Association of Northwest Chicagoland
- Wabash Valley Power Association

### **Trade Associations**

- Association of TeleServices International, Inc.
- Building Owners and Managers Association of Chicago
- Casket & Funeral Supply Association of North America
- Mechanical Services Centers Association
- National Ground Water Association
- National Systems Contractors Association
- National Association of Wastewater Technicians
- North American Wholesale Lumber Association
- Ohio Concrete Masonry Association
- Specialty Equipment Marketing Association
- U.S. Green Building Council

## **Appendix IV: Case Study**

### **Staff Incorporates Process Redesign Skills and Technology to Streamline Certification Process and enhance effectiveness and revenue.**

#### **Strategic Issue:**



The Society of Wetland Scientists was formed to further non-profit scientific and educational objectives related to wetland science. The Society developed a program for certification of wetland science training and experience as a separate not-for-profit corporation to meet the needs of professional ecologists, hydrologists, soil scientists, educators, agency professionals, consultants, and others who practice wetland science.

The certification process was bogged down with paperwork and took three to four months to complete. The application has eight sections including code of ethics, education, work experience, a statement of expertise essay, and references. Most sections went through a verification process, which meant copies had to be made, and the confirmations were assembled with the original application. Each of the nine-person review panel received a printed packet of materials for every candidate. The reviewed applications, which sometimes needed to be accessed, were kept in boxes neatly piled high in storage rooms. Applications were sometimes rejected numerous times and the process was restarted each time. Because the process was so onerous, selected candidates gave up on completing their application and did not get certified. Review panel members donated many hours of their time to ensure the process was performed accurately and fairly. Labor, storage, printing, and mailing expenses were high.

#### **Strategic Approach:**

The Center for Association Resources (The Center) introduced an improved process and certifications are now completely online. The application is now completed, reviewed, and verified without a single piece of paper.

Tracking number, instructions, examples, and required fields were added. Other improvements included keeping the application open so the applicant did not have to start over after locating information needed, clearing old comments before a new review, reviewing all supporting documentation before the application is submitted, and ensuring payment before a review is begun.

Certificates are now sent electronically, and seals are mailed directly from the manufacturer. Fifteen years of applications were digitally scanned onto a single searchable DVD, saving many hours of time as well as storage expense.

To attract those who may have started but not finished the process in the past, the website now proudly states “The application process is done EXCLUSIVELY online” and “SWSPCP, in an effort to serve you more efficiently, has moved to an online Certification Application and Certification Renewal Application process.”

## **Resulting Changes:**

The online process developed by The Center has reduced cycle time from about 120 to 45 days. In addition to the time saved, expense saved, and error reduction inherent in automating a manual process, the project has increased revenue from multiple sources and improved cash flow.

Key improvements are:

- The annual renewal is online and most people pay faster and online rather than by mailing a check.
- More people apply for certification since the process is much easier.
- Staff now has time to make a friendly reminder call to slow payers which has yielded excellent results.
- Staff also does Internet searches to find those who have not renewed and may have moved.
- Lapsed members are removed from the membership file in a timely manner.

Over a two-year period, total revenue is up 129%. SWSPCP was so pleased that they signed a new contract of longer duration with The Center.

## **Appendix V: Case Study**

### **Clearing the Revenue Drain With Online Training and Revenue Sharing**

#### **Challenge/Strategic Issue:**

The National Association of Wastewater Technicians (NAWT) serves the needs of septic and sewage hauling companies, portable sanitation companies, sewer line cleaners, septic system installers and any other firm that provides sanitary waste related services. This non-profit organization had faced several years of declining membership and somewhat declining revenues. There were many challenges in the financial reporting format. The Center for Association Resources (The Center), chosen as NAWT's new Association Management Company (AMC), was asked to revitalize the association and put it on a growth path.

#### **Strategic Approach:**

The Center worked with the organization's leadership to find new opportunities for serving its members and industry. NAWT members are small, family-owned companies whose owners struggle to attend a few days of training because there is no one left to do the work while they are away. After learning about the typical member profile, that state regulation requires that wastewater technicians receive training for home septic system inspections (some states have



additional training requirements), and NAWT's status as a preferred training vendor, The Center recommended the structuring of online training as an attractive service offering.

The Center developed a revenue sharing program where state associations receive payment when its members take the online training. When the state associations saw the low break-even point between their membership fee and training revenue, additional associations joined NAWT. NAWT was able to work with many state associations to co-market the training. The vendors who developed and teach the training also receive a per pupil stipend. The two revenue sharing programs reduced both the need for a large financial investment and limited the risk of undertaking the project. The very successful program was also expanded into Canada.

NAWT included membership information and links to its website with the training registration and certificates of completion. When industry members became aware of NAWT's existence through the training, they recognized the value in joining an organization that lobbied the EPA and other regulatory bodies, supplied industry news through its newsletter, and a subscription to Pumper Magazine, and offered excellent training on a variety of topics.

#### **The Resulting Solution and Changes:**

With the expansion of online training, NAWT has seen a sizeable increase in both membership and revenue. Over the last three years, non-dues revenue from training has increased 34% and individual membership is up 13%. Four new Canadian associations have joined NAWT.

"The Center has raised the professional appearance of our industry and turned a financially struggling organization into one with a positive cash flow. We have exceeded our budget and have had a positive cash flow in each of the past three years," explained NAWT Secretary Tom

Ferrero. “The Center’s team has been invaluable in working with state organizations to set up more than 20 NAWT training sessions each year around the country, organizing and facilitating our presence at two national conferences each year, and planning one specialty symposium for our members that is held about every second year. As Secretary of NAWT for more than twenty years, I find our organization is in the best position it has been in to support our members going forward. I attribute this to the team at The Center for Association Resources.”

## Appendix VI: Sample First Steps of Transition Plan (An Excerpt)

WEEK	1	2	3	4	5	6	7	8	9	10	11	12
<b>ADMINISTRATION</b>												
Meet with outgoing management firm	x											
Review the annual business calendar of events	x											
Establish a cut-off date for work in process			x									
Conduct an equipment and storage inventory			x									
Execute management agreement		x										
<b>VENDOR CONTRACTS</b>												
Receive list of all vendors for address change		x										
Receive list of all Accounts Payable balances		x										
Review and take control of all vendor operations				x								
Renegotiate contracts as necessary									x			
<b>GOVERNANCE</b>												
Acquire articles of incorporation, bylaws, minutes, registered agency, and tax filings		x										
File Illinois business license			x									
Review Policies & Procedures manuals				x								
Become familiar with current Strategic Plan			x									
Identify future Board meeting dates and confirm Outlook invites			x									
<b>FINANCE</b>												
Obtain current year budget and conduct detailed review		x										
Create realistic two-year budget proforma					x							
Update Signatories on operations bank accounts		x										
Implement credit card processing changes		x										
Review Association financial protocols/approvals						x						