

May 2023

ASSOCIATION MANAGEMENT PROPOSAL

KW CONSULTING, LLC

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KW
CONSULTING

LETTER OF INTRODUCTION

May 16, 2023

Board of Directors
National Society of IT Service Providers

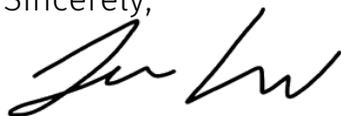
Dear Directors,

KW Consulting is pleased to present our proposal for association management services for the National Society of IT Service Providers (NSITSP). As you evaluate proposals, we invite you to consider the advantages of our team:

- We have extensive experience in successful program development that leads to higher member satisfaction and enhanced influence of the organization.
- We place a premium on meaningful connections with relevant stakeholders and industry partners to propel an organization's mission.
- We are constantly engaged in learning opportunities where we can bring best practices to your organization, while also focusing on innovation.

Our team is excited at the prospect of working with you. We appreciate the opportunity to present our firm and our team. Please feel free to call me at 505.417.4001 if you have any questions concerning our proposal.

Sincerely,



Jason Espinoza, Co-Founder of KW Consulting, LLC

QUALIFICATIONS & RESUMES

KW Consulting is submitting this proposal to provide association management services to the National Society of IT Service Providers.

Our team members are experienced in 1) leading associations in a strategic manner to maximize growth and impact; 2) program development that leads to increased member engagement; 3) identifying and engaging stakeholders to increase collaboration and influence; 4) planning and executing high impact events; and 5) successful board management and strategy.

Firm Qualifications

KW Consulting is a full-service association management firm. We build and lead organizations, so they can advance their industry, the economy, and their mission. We do this by providing a customized team of top-level professionals who are experts in the critical areas of organizational management.

With over a decade of experience in nonprofit and association leadership, KW Consulting can assist the Board of Directors of the National Society of IT Service Providers in elevating the professionalizing the association so that it can fulfill its mission of establishing high standards and ethics for the IT profession.

Our professionals are active members of the American Society of Association Executives, AMC Institute, Association Societies Alliance, Society for Human Resource Management, and the New Mexico Society of Association Executives.

JASON ESPINOZA

Co-Founder of KW Consulting



Jason Espinoza is co-owner of KW Consulting. Hason brings over a decade of experience in association management, public

policy, and government affairs. He previously served as President and CEO of New Mexico's statewide chamber of commerce and prior to that served as its Vice President of Government Affairs.

Jason also served as Executive Director of the New Mexico Health Care Association, where he successfully led an ambitious effort to reinvigorate the organization through a member-driven policy platform and opportunities to meaningfully engage the membership.

Jason earned a Master's degree in Political Management from The George Washington University. He also graduated summa cum laude from Arizona State University with bachelor's degrees in History and Political Science.

Significant Projects

- Organizational management of the New Mexico Society of Association Executives, NMIDEA, Greater Albuquerque Medical Association, New Mexico Retail Association
- Strategic management consulting for the Mechanical Contractors Association of New Mexico and Sheet Metal Contractors Association of New Mexico
- Economic recovery consulting for a seven-county planning and development district, Eastern Plains Council of Governments.
- Workforce recruitment and retention analysis and report for the City of Deming.

Association Achievements

- Increased member participation in statewide chamber events and meetings by 97 percent.
- Increased member dues revenue of statewide business association by 42 percent.
- Increased event revenue of statewide industry association by 134 percent.
- Honored by the Association of State Chamber Professionals for membership growth.

BRITTANY ESPINOZA, CAE

Co-Founder of KW Consulting



Brittany Espinoza is co-owner of KW Consulting. She earned her Certified Association Executive credential in May of 2022. The CAE credential

is a nationally recognized designation of a committed association professional who has demonstrated the wide range of knowledge essential to manage an association in today's challenging environment.

Brittany has years of experience in marketing and community engagement. As a graduate of the University of New Mexico, Brittany is passionate about helping associations set up operational processes and strategic campaigns to enhance their impact.

Brittany is committed to her work with associations to continue advancing industries and professions, improving quality of life, and delivering solutions to strengthen communities.

Significant Projects

- Developed comprehensive marketing and communications campaign for statewide trade associations in the hospitality and technology sectors
- Created and implemented a multi-platform communications campaign focused on enhancing customer recruitment and retention for a high-growth business.
- Managed a variety of events including awards ceremonies, industry conferences, and continuing education seminars

Significant Achievements

- Increased event sponsorship for trade association's two signature events by 194% over the previous year
- Redesigned a peer learning program to increase engagement and attendance in monthly virtual meetings focused on four distinct industry topics
- Managed over 100 consistent sponsor partnerships, including prospecting, sales, onboarding, and executing deliverables.

JOHN ESPINOZA

Strategic Consultant



John Espinoza is a strategic consultant to KW Consulting and owner of J2P Solutions.

He has years of private sector management experience in urban and rural New Mexico. In his management roles, he developed a strong ability to effectively identify and analyze factors that affect the return on investment for the business, management, and staff.

John generated and maintained operating budgets to ensure a high performing and financially viable business. He creates strong relationships with partners and the community at large.

He has served as a consultant to a collective of local governments to analyze and provide recommendations for the economic recovery in New Mexico.

He is able to perform insightful analysis and create subsequent visualizations that provide valuable information through the proficient use of Python, SQL, and Tableau, among other similar tools.

Significant Experience

- Data analysis and support for municipality's Workforce Recruitment and Retention Report.
- Program management of NM Safe Certified, a statewide COVID-Safe training program.
- Research and data support for economic recovery efforts in the a seven-county planning and development district, Eastern Plains Council of Governments.
- Oversee administration of association management system for several statewide trade associations.

Significant Achievements

- Increased profit and traffic year over year while managing establishments in a variety of urban and rural locations
- Utilize analytics and data science to identify and solve complex business and public policy challenges.
- Created relationships with clientele and stakeholders while maintaining adherence to brand standards

TIFFANY RIVERA

Strategic Consultant



Tiffany Rivera is a strategic consultant to KW Consulting and is based in Las Cruces, New Mexico.

She has over 8 years experience in advocating within legislative and regulatory branches.

Over the past 3 years, she has worked in a statewide association that actively represents 20,000 members. Tiffany exhibits skills in advocacy, negotiation and influence without authority and excels in organization and prioritization.

Tiffany has experience in event planning and execution, including sponsorship sales and sponsorship development.

Significant Skills

- Orchestrates legislative efforts, tracks, analyzes, and monitors legislation, provides testimony, attends committee and floor sessions, collaborates with other lobbyists, state agencies, and legislative staff.
- Provides legislative member updates via weekly reports, calls, and creation of a policy primer. Coordinates opportunities for engagement throughout the session, including capitol visits and committee participation.
- Actively collaborates with other organizations on shared priorities.
- Maintains relationships with our Congressional delegation and staff, executes member fly-ins.
- Served as tribal liaison promoting strong interactions with tribes and pueblos.
- Developed and executed special projects, presentations, events, and programs on behalf of the Secretary of Agriculture.

Knowledge & Experience

Case Study #1: Science is US

KW Consulting has worked with Science is US, a program of the American Association for the Advancement of Science in the development and implementation of a strategic outreach plan for New Mexico that will create an open dialogue for policymakers to ensure they have the best understanding of how science and engineering are critical to their decision and policymaking processes.

KW Consulting has taken the lead on several key aspects of the strategic plan, including building New Mexico's science and engineering mosaic. KW Consulting has worked to develop a broad range of industry leaders and coalition supporters that utilize science and engineering to enhance quality-of-life initiatives throughout the state.

KW Consulting has also designed and coordinated introductory evidence-based policy bootcamps and outreach opportunities to introduce the principles of evidence-based policymaking to policymakers and other legislative stakeholders in New Mexico.



**Science
is US**

Knowledge & Experience

Case Study #2: NM Safe Certified

In May 2020, KW Consulting acquired a grant through the New Mexico Tourism Department for the New Mexico Society of Association Executives to develop and implement an on-demand training program focused on New Mexico's COVID-Safe Practices for businesses. The initial program focused on tourism-related industries. In July 2020, the program was expanded to additional industries including agriculture, construction, and manufacturing.

KW Consulting, the association management company for the New Mexico Society of Association Executives, created over 20 educational videos in both English and Spanish to educate business owners and employees on COVID-Safe Practices specific to their industry. Our team provided support and verification of completion to over 10,000 businesses.

We worked collaboratively with over 35 governmental agencies, trade associations, and community organizations to market and promote the program. The program brand has become well-known in New Mexico and a symbol of industry leading the way during the pandemic.



Knowledge & Experience

Case Study #3: ExperienceIT

In 2022, KW Consulting was hired to help the New Mexico Technology Council reimagine and grow their signature event, ExperienceIT. ExperienceIT is an annual technology conference that aims to bring together industry leaders, innovators, and enthusiasts to explore the latest trends, advancements, and opportunities in the IT sector.

ExperienceIT had been a well-established event for several years but was looking to take its success to the next level. KW Consulting recognized the need for strategic initiatives to boost attendance, secure valuable sponsorships, and curate an exceptional roster of speakers.

Through a targeted marketing campaign, engaging content strategy, and a focus on partner collaboration, ExperienceIT registrations grew by 48% in 2022 compared to 2021. Additionally, KW Consulting developed high quality sponsorship packages and a seamless sponsor experience, which led to increasing sponsorship revenue to grow 67% over the previous year, raising more than \$76,000 in sponsorships.



NMTC
experience IT nm

SCOPE OF WORK

Executive Leadership. The National Society of IT Service Providers needs a strong executive that can effectively establish a credible presence among members and stakeholders. KW Consulting has a proven track record of building up associations and positioning associations as industry thought leaders.

Board Support. Volunteering to be on the Board of Directors comes from a deep seeded passion for the organization's mission. KW Consulting provides the behind-the-scenes support for all board and committee members. Through coordination of meetings to executing special projects, you can focus on the big picture, while we take care of the administrative tasks.

Event Management: With any event, there are many moving parts, which is why KW Consulting will take the lead on logistical planning, marketing, and post-event follow up. Our team has experience in executing a variety of virtual, hybrid, and in-person events, ranging from exclusive meetings to large annual conferences.

Financial Services: KW Consulting has extensive experience in building and managing budgets, processing membership renewal cycles, and day-to-day administration of association financial accounts. This includes management of accounts payable and receivable, ensuring accurate and timely processing and conducting financial audits and facilitate tax compliance.

Member Relations: Members are the lifeblood of any association, which is why it is imperative to focus on recruiting, engaging, and retaining members. KW Consulting believes that the member experience should be at the forefront of all decisions. We will continually identify prospective members and create a seamless onboarding process, while also analyzing data to re-engage less active members. This include moving the association to an innovative Association Management Software to centralize billing, registration, and applications.

SCOPE OF WORK

Communications. Having a strategic and consistent communication plan is critical to member retention, event attendance, and partner investment. KW Consulting will outline a communications plan for the year that spans digital media, such as website management, social media, and email marketing, as well as public and press relations.

Day-to-Day Administrative Management: General governance of the association such as reviewing, and, if necessary, recommending revisions to the associations governing documents, scheduling and holding meetings in compliance with the by-laws, overseeing the preparation and filing of any documents needed to preserve the association's legal status, including state tax filings and business licenses. Additionally, establishing and maintaining corporate policies and procedures, and ensuring appropriate levels of insurance for the associations and its directors and officers.

Term & Fee

KW Consulting proposes an initial term of 12 months. At this point the NSITSP and KW Consulting can reevaluate the scope of services to determine the needs of the organization and board of directors moving forward.

KW Consulting proposes a flat monthly rate of \$3,500 for full association management services outlined in the management plan. The proposed initial term is for 12-months for a total contract fee of \$42,000, plus reimbursement for pre-approved expenses.