

PROPOSAL FOR:

Association Management Services

for

National Society of IT Service Providers

05/18/2023

PREPARED BY:



J&M Business Solutions
3053 Nationwide Parkway
Brunswick, Ohio 44212
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jmbsohio.com

Administrative Services

Our fully-staffed office can provide your board, committees and membership with seamless, top-notch service.

Office

J&M has a 4000 square foot office space in Northeast Ohio and is conveniently located near a major highway. A large meeting space is available at no additional cost to our clients. Our offices will serve as NSITSP's headquarters and are secured and protected by an ADT alarm system.

Our office is fully-staffed and we maintain an inventory of basic office supplies, office equipment, and event supplies.

Day-to-Day Operations

As a member-focused organization, we understand how important it is to have a “human” voice on the phone. Phones are personally answered by our receptionist, Monday through Friday, 8:00 am to 4:00 pm ET. Voicemail is available during non-business hours. All phone and email inquiries are responded to within one business day.

Other duties performed by J&M include:

- Receive mail and fax
- Answer phone calls
- Respond to all email inquiries
- Prepare correspondence
- Manage negotiations and contracts
- Manage accounts receivable/accounts payable
- Provide budget oversight
- Adhere to your specific operational procedures and board policies
- Update materials
- Manage mailings

J&M's organizational structure allows us to be flexible in what we can do for your association. We can take on various support tasks such as updating informational materials and stationary to responding to requests from members, officers, and committee members.

Storage and Retention Policy & Archival

J&M will adhere to your specific record retention policy. We have a large storage area on-site where any hardcopy records or supplies can be kept. We will maintain an inventory of NSITSP's stored materials.

Electronic records and scans are retained on our servers. J&M implements and enforces technical safeguards by using the security standards recommended as industry best practices. Every night an off-site differential backup is ran on our server and every Saturday a full system bare-metal backup is taken of all servers and data. We utilize military grade security backed by EMC. All data is encrypted locally during the initial backup process and encrypted files are sent via a secure SSL connection.

Board & Committee Support

Our Executive Administrators have many years of experience working directly with officers and boards and can assist with:

- Mission, vision and bylaws
- Strategic planning
- Policies and procedures
- Insurance policies including D&O and events
- Meeting set-up (reserve meeting location or create a virtual meeting link)
- Meeting agendas and supporting materials
- Collecting all committee reports, financials, research, etc. for meeting packets
- Preparing meeting packets and sending notices/reminders
- Taking meeting minutes, noting action items and adhering to the specified approval process and distribution time frame
- Recording attendance
- Providing knowledge of NSITSP's policies and governing documents
- Updating any governance items as requested
- Archiving all approved minutes and governance documents per board-approved procedures
- Meeting registrations, hotel reservations, meals, travel reimbursements and other related items.
- Archiving association materials and files

- Distributing and tracking call for nominations and ballots
- Leadership training

J&M is accustomed to attending board meetings virtually and in person. J&M has extensive experience using Zoom, GoToMeeting, GoToWebinar, Microsoft Teams and Google Meet.

Financial Management

J&M is experienced in accounts payable and accounts receivable. Three of our employees are Quickbooks certified. We currently manage budgets for fourteen (14) organizations and we have a strong process of checks and balances to ensure accuracy. We will work closely with your leadership to adhere to NSITSP's financial and fund disbursement policies and procedures.

We are experienced with accepting payments via online shopping cart, credit cards, PayPal, electronic deposits, cash and hard copy checks. Your Executive Administrator will reconcile and prepare NSITSP's financial reports and end-of-year statements for board approval.

Below is a list of financial tasks we can provide, including, and in addition to, your RFP.

- Assist in creating annual budgets
- Pay all invoices, travel reimbursements, contract-related costs and other expenses
- Produce invoices and receipts
- Account reconciliation with online banking and QuickBooks
- Monitor investments
- Prepare event budgets, event profit/loss statements
- Assist with audits
- Prepare monthly financial reports for board review and approval
- Maintain official records and documents according to your records retention policy
- Collaborate with a CPA to ensure all tax filing deadlines are met
- Coordinating with Investment Firms
- Maintain non-profit status

Membership Support

Database Management

J&M currently uses MemberClicks for twelve (12) of our clients, who are receiving a discounted rate on the service. Staff has extensive knowledge of the software and has been trained in all aspects. We are also experienced in other membership database programs and wordpress databases.

Below is a list of tasks we can provide:

- Maintain accurate records of members, board and committees
- Maintain accurate information on your website
- Maintain information on all lapsed, expired and prospective members
- Send membership renewal invoices and reminders and process dues
- Produce customized reports (membership, event/program, etc.)
- Send membership welcome, renewal and informational letters
- Maintain current listservs

Membership Recruitment

J&M staff has experience in creating marketing plans and member campaign materials that include email communications, direct mail, and utilizing social media platforms with special landing pages. Our in-house graphic designer and webmaster can design all campaign materials and website landing pages.

Our in-house graphic designer can create a membership brochure to be used when recruiting and closing new members. We can either update your existing membership brochure (if any) or completely redesign a new brochure.

Communications & Marketing

J&M has experience coordinating all types of communications to and from members. We can disseminate information through attractive mass emails, e-newsletters, social media and printed materials.

We offer in-house, inclusive marketing and communication services, such as:

- Graphic designer for promotional materials (postcards, mailers, electronic)
- Webmaster for timely website updates
- Beautifully designed e-blasts (mass emails)
- Electronic and printed newsletters & magazines, designed and edited
- Securing advertisers
- Regular social media posts
- Press releases, produced and disseminated
- Create and distribute surveys and compile results (SurveyMonkey available to our clients at no cost)

Website Management and Support

J&M provides full-service website design, management, Search Engine Optimization (SEO) and analytics. Our in-house webmaster has extensive experience in designing and maintaining websites hosted on a variety of platforms including WordPress and MemberClicks. This experience also includes website customization such as member-only sections, blogs, job boards, online community platforms and resource libraries. We can also maintain online forms such as membership applications/renewals, event registration, sponsor/exhibitor registration, and surveys.

Social Media

J&M has dedicated staff for social media management (Facebook, Twitter, LinkedIn, Instagram, Pinterest, YouTube). We will design and manage brand consistency across NSITSP's social media profiles to elevate awareness of your Association. This design will also carry over into your website and events.

Newsletter Production Services

J&M can design, edit and distribute full-color magazines, e-blasts and e-newsletters. Our graphic designer oversees the production process to ensure timelines and deadlines are on track. Editorial services are provided in-house. We have a trusted local mail-house we work with for the printing and mailing of the publications.

Conference Management

J&M can fully execute your events in their entirety or assist your meeting chairs in turning their vision into reality. We are experienced in large events with attendance of 500+ as well as small monthly meetings.

Our goal is to coordinate a successful event that provides value to your members. With the direction of the program committee, J&M will take the lead on event planning, creating work plans, task delegations, timetables, scheduling and leading event-related meetings, and managing all on-site and off-site event logistics.

Budget and Event Financials

J&M has extensive experience in managing expenses, contract negotiations, and we can utilize creative ways to cut costs to ensure your event reaches its revenue goal. We will work hard to stay within budget and provide the planning committee with up-to-date attendee/financial reports throughout the planning stage. If we foresee any expenses going outside of the established budget, we will immediately contact the committee for guidance.

Site Selection and Contract Negotiations

Choosing the right location is critical as it needs to fit the specific needs of the event. Our event planners are well-experienced in working with hotels across the United States. We know what to look for and the questions to ask to ensure a good fit (adequate meeting rooms, proximity of meeting rooms, AV requirements/costs, layouts, logistics, parking and more). We will negotiate the most cost-effective and optimal contract to stay within the event budget.

Marketing and Promotion

Event marketing is a crucial element for a successful event. Having a well-thought-out communications plan for each event will help generate interest and increase attendance.

J&M staff members have extensive experience in marketing events via e-mails, event landing pages, social media, conference app design, printed promotional items and sponsor recognition signage. Our in-house graphic designer and webmaster will design and create any graphics, invitations, landing pages, registration portals, and social media content.

Online Registration

Our in-house webmaster will create conference web pages to provide important event information and allow for online registrations for attendees, sponsors, exhibitors, and speakers.

People can register online, pay by credit card, or request an invoice which is sent automatically. We track attendance and gross revenue from online transactions in real time and produce revenue reports.

We can also produce reports to compare trends from event to event that will provide great insight to the board/committee at wrap-up meetings.

Onsite Registration

On the day of the event, J&M will provide as many staff as needed to make the event go as smooth as possible. We will register guests, collect event fees and process any on-site credit card payments.

J&M has a portable printer to make badges for last minute guest changes or registrants. We also have a collection of ribbons to signify board members, speakers, etc. that NSITSP is able to use at no extra cost. This is a nice touch to recognize your key constituents.

Virtual Events

J&M is experienced in executing virtual (and hybrid) events in a variety of platforms including Zoom, Crowdcast, GoToWebinar and MemberClicks LMS. Use of the J&M Zoom account is available for clients at no additional cost.

Continuing Education

J&M currently submits CE's for five (5) associations and ten (10) sub-chapters across the United States. We have a process with customized checklists and timelines to ensure all requirements are met before each submission.

We can assist with promoting accreditation within member communications. We will keep records per your record retention policy and can update NSITSP's website as well as produce any attendance certificates and follow-up reporting.

Sponsorships

To increase your revenue for the event, J&M can assist in creating sponsor packages. We can review past conference financial records and expenses and develop appealing sponsor levels that provide an added benefit to those who choose to participate in that way. We will also design and distribute informational materials, participation forms and ensure each sponsor has proper recognition and signage.

Speakers and Programs

Captivating and credible speakers are the driving force behind event attendance, and we understand the importance of marketing those speakers to increase attendance. We can work directly with the planning committee to assist with program development and collect all information needed for marketing purposes and for the conference brochure/booklet. We have an online process for collecting speaker information (bio, picture, objectives and session information).

J&M can be the point of contact and arrange for all travel logistics for each speaker as well as

manage any speaker contracts, process honorarium checks and provide any thank you letters or gifts.

Conference Program & Signage

Our in-house graphic designer can design and coordinate the production of the conference program and any required signage.

Event Inventory

J&M has a large inventory to assist with events such as projectors, laptops, table tents, large registration signs, tripods, centerpieces, name tag printers, walkie talkies, flip charts, easels, name tag containers, sign holders, badge ribbons and much more to make your event run as efficiently as possible and to provide a savings to your association. We can also utilize your existing inventory and can store it in our office.

Post-Event Evaluations

Evaluating events is important to the success of the association and the value it brings to its members. Evaluations after each event provide important insight on what went well and what improvements could be made for future events. J&M can create and send surveys to attendees and exhibitors. We will prepare a Post-Event Report that includes survey results as well as a financial analysis of the event.

Pricing

Association Management Services <i>(per month)</i>	\$3,500
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Includes all items referenced within this proposal, such as administrative & operational support; membership services & support; board & committee support; financial management; event management; continuing education; publications and website; member marketing & communications; and technology solutions.

We invoice for fees on a monthly basis. We do not charge any transition fees.

Additional Costs

- Mileage billed at the IRS rate
- Black and white copies (\$.10 each); color copies (\$.45 each)
- Postage and shipping
- Dedicated phone line (if applicable)
- Storage fee, if applicable (depending on the amount of space required)
- Board approved travel expenses (coach airfare, hotel, rental car, food, etc.)
- Office supplies that are above and beyond normal supplies kept in office
- Insurance riders, such as event insurance
- Website expenses (domain, hosting, shopping cart)
- Mobile app expenses (if applicable)

Shared Supplies

J&M purchases and maintains certain products and services that are shared among our clients, such as:

- Office and overhead costs (storage area, security alarm system)
- Office equipment & office supplies
- Large inventory of event supplies
- Tech-savvy online solutions
- Meeting Owl
- Software (such as Office 365, Adobe Creative Suite, etc.)
- GoToMeeting, GotoWebinar and Zoom accounts
- QuickBooks
- IT infrastructure and tech support
- SurveyMonkey
- DoodlePoll
- SharePoint

About J&M Business Solutions, LLC

J&M Business Solutions, LLC was founded in 1994 and is a woman-owned, full-service Association Management Company. We have worked with national, state and local associations across the United States and strive to ensure our clients receive excellent customer service while being flexible enough to tailor our services to meet the needs of your organization. J&M is a proud member of the following organizations:



View samples of our work at jmbsohio.com/nsitsp/

We offer the following *in-house* services:

- Association Headquarters
- Administrative & Clerical Support
- Policies & Procedures Development
- Board & Committee Meetings & Support
- Board Governance
- Membership Services & Database Management
- Membership Growth & Development
- Financial Management
- Conferences, Conventions & Trade Shows
- Virtual Conferences and Webinars
- Sponsorship Program Growth & Development

- Technology Solutions
- Mobile Applications
- Certification, Accreditation & Continuing Education
- Educational Programming
- Online Exams
- Website Development & Maintenance
- Search Engine Optimization
- Directory Expertise
- Online Job Board Management
- Marketing & Creative Services
- Communications & Marketing
- Social Media Management
- Strategic Planning
- Board Leadership Training

Client List

Currently, J&M currently manages twenty-one (21) clients:

Akron Tax and Estate Planning Council

Association of Fundraising Professionals, Greater Cleveland Chapter

Association of Environmental and Engineering Geologists

Great Lakes Chapter of the American Association of Airport Executives

Matthews Boat Owners Association

National Association of Benefits & Insurance Professionals Ohio Chapter

- National Association of Benefits & Insurance Professionals Greater Cincinnati
- National Association of Benefits & Insurance Professionals Northeast Ohio
- National Association of Benefits & Insurance Professionals Northwest Ohio
- National Association of Benefits & Insurance Professionals Western Reserve

National Drilling Association

- Mid-Atlantic Drilling Association - Maryland and Virginia
- Northeast Drilling Association - Massachusetts, New Jersey and Rhode Island
- Buckeye Chapter Drilling Association - Ohio

- Lone Star Drilling Association - Texas
- Old Dominion Drilling Association - Virginia
- Tri-State Drilling Association - Pennsylvania
- South East Drilling Association - North and South Carolina

Northern Ohio Charitable Gift Planners

Ohio Pest Management Association

Ray E. Helfer Society

Client References

Fran Anderson, List Marketing Group
 Immediate Past President
 Association of Fundraising Professionals, Greater Cleveland Chapter
 216-440-1794
Fran-a@sbcglobal.net

Kelly Belote, The Bostwick Braun Company
 President
 NABIP Ohio
 419-259-3600
kbelote@bostwick-braun.com

Sam Connelly, Connelly & Associates
 President
 National Drilling Association
 240-367-7937
sam@connellyandassociates.com

Transition Process

During transition, Sheri Maskow would be your primary source of contact. Once she has familiarized herself with your association, she will assign the best qualified employee as your point of contact. Other employees will be involved based on their areas of experience (i.e., bookkeeper, administrator, webmaster, etc.). More information about our staff and their roles can be found at jmbsohio.com/about

Our transition process involves the following:

- We would provide you with our transition questionnaire and spreadsheet. This notes any passwords and other items we require to move forward with a smooth transition.

- We would arrange for any hardcopy materials, inventory and any storage items to be shipped to our office. Upon receipt of these materials, we will catalog what was received and assign a designated area in our storage.
- Any electronic documents can either be e-mailed or mailed on a flash drive. Upon receipt, these documents will be uploaded onto our server under a designated folder.
- All hardcopy files will be converted to electronic files and uploaded onto our server. We will review and follow your retention.
- A thorough review will be conducted of all files and a list of questions and/or concerns will be created.
- A conference call will be scheduled to discuss the transition, including reviewing the list of questions and addressing the immediate needs of the association. We would welcome any assistance from the current executive secretary to ensure a smooth transition.
- We will have preparations in place for the phone, voicemail and e-mail to transfer to our office on the specified start date.

We do not charge a transition fee; the only expense would be the cost of shipping materials.