



# MANAGEMENT PROPOSAL

Prepared for



One Capitol Mall, Suite 800  
Sacramento, CA 95814

[www.amgroup.us](http://www.amgroup.us) | 916.444.3568



May 12, 2023

Mr. Karl W. Palachuk  
National Society of IT Service Providers

Dear Mr. Palachuk,

Advocacy & Management Group, Inc. (AMG) welcomes the opportunity to provide a proposal for our management services to the National Society of IT Service Providers. We look forward to continuing to learn more about the needs of the association and options for supporting the goals you have shared.

AMG has a long history of providing the highest quality association management services. Our firm's experience makes it well equipped to provide a wide array of services to its clients and we are confident that we can provide the specified areas of service your organization currently requires. Organizational duties are assigned to, and performed by, experienced and professional staff. These association professionals are dedicated to providing superior, personalized service to each AMG client organization.

AMG works in partnership with the organization's leadership to assure progress toward goals set by the Board of Directors. Currently, we have several individuals on staff with the expertise to assist you in your efforts and have shared brief descriptions of their backgrounds within the enclosed proposal. With that in mind, and based on the description of the services we've received through the request for proposal, we have included a detailed description of our services, fees, and contract requirements. To clarify, our proposal provides detail regarding the following service areas:

- Executive Leadership
- Board of Directors and Committee Support
- Meetings, Events, and Education
- Membership
- Marketing, Communications, and Website
- Accounting
- General Office Administration

AMG typically outsources specialized professional services such high-level design work, legal work and campaign work for public relations. That said, our contract will cover all of the elements of management as listed above and will be carefully outlined in the agreement. Our fee structure is based on the overall scope of work needed by the organization.

The services outlined in this proposal are an attempt to capture all of the elements needed for the administration and professional management of your organization, however we know it is difficult to capture every nuance on first review. Therefore, we would welcome a meeting with your leadership group to discuss details and to make any needed adjustments to our proposal.

Enclosed information:

- AMG Mission & history
- Introduction
- Location
- AMG principals
- Executive & support staff profiles
- Client profiles and references
- Specific proposed services and fees

Please take a moment to review our web site at [www.amgroup.us](http://www.amgroup.us) and feel free to contact me, or my business partner Gloria Peterson, should you need any further information or clarification of our proposal packet.

AMG's principals and staff look forward to working with you to ensure that AMG has a full understanding of the services needed by your group, and how we can best meet those needs.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kimberly Andosca', with a stylized, flowing script.

**Kimberly Andosca**

Principal & Chief Financial Officer

Advocacy & Management Group, Inc.



## OUR MISSION

**A**t AMG, our mission is simple – to assist clients in fulfilling their unique missions. AMG accomplishes its mission by offering a wide range of professional association management services, taking an active role in the affairs of every client, and ensuring that all goals are met in a professional, timely, and cost-effective manner. As such, AMG is committed to:

- Provide Executive Management of your association in accordance with its organizational mission and strategic goals.
- Managing day-to-day operations.
- Assisting your board in budgetary review, making recommendations consistent with projected revenue, and implementing fiscal objectives.
- Overseeing policies and procedures to uphold bylaws, standards for accreditation and licensure.
- Working in partnership with association leadership to increase the value and strength of membership.
- Projecting the association's public image and appropriately promoting programs and services.

## AMG HISTORY

Advocacy & Management Group, Inc. (AMG) was created in 2003 by the merger of two long-time association management and lobbying firms. Founder Bob Achermann and current Principals Kimberly Andosca and Gloria Peterson each have decades of experience providing association executive management. AMG has grown to serve twenty-three (23) clients. It also has had several short-term clients, whose specific issues have been successfully resolved.



## INTRODUCTION TO MANAGEMENT SERVICES

Advocacy & Management Group, Inc. is a full-service association management and government relations firm. By selecting AMG as your management company, our team becomes your staff, without the fiscal and human resource costs associated with maintaining such an experienced team.

AMG can provide your association with a range of services, including:

***Executive Leadership***  
***Financial Management & Administration***  
***Membership Marketing & Database Management***  
***Trade Show & Exhibit Management***  
***Publication & Communication Management***  
***Website Development & Management***  
***Support for Government Affairs and Grassroots Advocacy***  
***Subsidiary Management (PACs, Charitable Foundations)***

Whether your association needs full management services or has specific management needs, AMG can provide services at all levels of association administration.

## BUSINESS MODEL

Our business model is to assign a client-specific team of association professionals with executive leadership and oversight to fulfill the scope of services requested.

## NUMBER OF EMPLOYEES

Organizational duties are assigned to and performed by experienced and professional staff. AMG's staff of 49 includes executive management, financial and accounting experts, membership specialists, database managers, IT specialists, communications experts, meeting planners, and support staff – all of whom provide superior, personalized service to each AMG client organization.

## **NSITSP'S NEW HQ... AN ICONIC BUILDING IN THE HEART OF CALIFORNIA'S CAPITOL**



Located in a beautiful landmark building, our offices at One Capitol Mall offer you a prestigious Sacramento address reflective of the profession you represent. Our newly-renovated office includes a well-appointed boardroom, 24-hour security, and easy access to affordable parking. Located on the floor below us is a state-of-the-art educational facility boasting cost effective access to the latest in teaching technology providing us with access to classrooms as we need them. Other benefits of your new office space include:

- ✓ Less than 10 miles to Sacramento International Airport
- ✓ A few blocks from the California State Capitol
- ✓ Several hotels within walking distance
- ✓ Close proximity to the city's best restaurants

**1 CAPITOL MALL, SUITE 800  
SACRAMENTO, CA 95814**

## UNMATCHED SERVICES PROVIDED

### PROFESSIONAL

Associations must operate as efficient businesses, strive for a surplus of revenue over expenses, and consider issues such as competition, market share and stakeholders. Our professional services program offers the following for your association:

- An assigned Executive Director to
  - Oversee and assure the organization's long-range goals are managed consistently and aggressively under the direction of the Board of Directors and per the Bylaws and policies of the association
  - Provide leadership in developing program, organizational and financial plans with the Board of Directors and staff, and carry out plans and policies authorized by the board
  - Coordinate active broad and committee volunteer participation in all areas of the organization's work
  - Maintain a working knowledge of significant developments and trends in the industry or profession represented
  - Ensure that the board is kept fully informed on the condition of the organization and all-important factors influencing it
  - Facilitate leadership training, strategic planning, and orientations for the association board and its regional organization leaders
  - Publicize the activities of the organization, its programs, and goals
  - Establish sound working relationships and cooperative agreements with stakeholder groups and organizations
  - Represent the programs and point of view of the organization to agencies, state and local representatives, organizations, and the public
- Day-to-day management including appropriate staffing and administrative structure
- Assist in the development of both short- and long-range goals, objectives, and policies
- Review and recommendation of operating budgets consistent with projected revenue and goals

- Review, maintain, update, and distribute association bylaws, meeting minutes, and policies & procedures documents
- Assist in the formulation and execution of new policies determined by the Board of Directors
- Work closely with contracted lobbying and/or regulatory professionals ensuring project continuity and accurate communication
- Direct and supervise contracted-for services to support association needs, including legal counsel, directors' and officers' insurance and general liability insurance
- Represent the association, as determined necessary by the Board of Directors, with industry coalitions, councils, boards, and the public
- Develop and distribute necessary press releases
- Coordinate media relations outreach efforts both internally and coordinated with a professional public relations firm, when necessary
- Maintain regional organization and chapter relations
- Coordinate marketing of special meetings for regional organizations to support attendance efforts
- Coordinate both state-wide and regional organization elections and balloting, as needed
- Coordinate appropriate collections and reporting for state and federal Political Action Committees (PAC)
- Develop and distribute reports on membership demographics, statistics, etc.

## ACCOUNTING

Accurately monitoring financial resources and their application is a challenge for any association. Through effective budgets, performance monitoring, and accountability, AMG can provide association leadership with the tools required for effective decision making. Our accounting services program offers all levels of accounting services for the association. Through the use of QuickBooks, we manage and provide:

- Maintenance of records necessary to document receipts and expenses
- Maintenance of accounts payable, accounts receivable and membership dues

- Assist with budget development and manage board approved budgets
- Recommend long-range and short-term financial goals and policies
- Research and obtain insurance coverage for general liability and directors and officers
- Credit card processing and reconciliation
- Oversight of accounts receivable and implementation of appropriate action on delinquent accounts
- Bank statement reconciliation and initiation of bank deposits
- Assist on matters related to internal and/or external audits
- Provide access to financial records for officers and members of the Board of Directors
- Facilitate CPA preparation of tax filings and end-of-year reviewed financial statement
- Prepare specialized reporting as appropriate

## MEMBERSHIP

Growing an association is not unlike tending a garden. Knowledge, experienced planning, use of key tools, and continuous care and dedication, help you cultivate the very best crop. AMG can provide the tools, resources and talent your association needs to reap the best possible harvest. Our membership services program provides all the necessary tools to accomplish membership needs:

management of membership database, including meeting attendees and detailed information on prospective members

- Assist with development of membership campaigns consistent with association goals
- Process new member applications (including certificates of membership)
- Prepare and distribute mailing lists/labels
- Prepare appropriate membership notifications, renewal packets, and promotional items
- Manage renewal dues billing
- Create targeted prospective membership lists
- Prepare and distribute prospective member solicitation materials
- Prepare and analyze statistical membership reports
- Maintain regional and chapter relations
- Develop, evaluate, and supplement affinity, sponsorship, and other programs

## PUBLICATIONS & COMMUNICATION

The ability to communicate timely information to association members and interested parties is essential to the association. Keeping members up to date on the latest market changes, regulations and other pertinent association information is provided through our publications and communication services program. Working closely with the Association's Public Relations Committee we will:

- Newsletter/Journal
  - Coordinate and edit content and arrange publication layout
  - Arrange for publishing
  - Coordinate distribution
  - Solicit and bill advertisers
- E-communications
  - Coordinate, edit content, and arrange for distribution of electronic communications (email marketing, advertisements, etc.)
- Website
  - Coordinate site design (contract for design; AMG oversees ongoing maintenance)
  - Manage content including appropriate, timely updates using many popular platforms
  - Coordinate e-commerce and assure acquisition of needed security certificates
  - Examples of our client managed websites can be found on our website at [www.amgroup.us](http://www.amgroup.us)
- Social Media
  - Administer social media accounts - LinkedIn, Twitter, Facebook, Instagram, etc.
  - Develop timely, appropriate social media content
- Membership Directory
  - Compile/arrange membership data
  - Manage publishing for electronic or hardcopy distribution
  - Solicit and bill advertisers
- Coordinate/distribute other communications as directed



## GENERAL OFFICE ADMINISTRATION

Office services are essential to the everyday function of your association. Through AMG's office services program, we provide all the support necessary to maintain an association's daily activities, including:

- Regular business operating hours: Monday - Friday, 8:30 AM - 5:00 PM
- Administrative support
- Receipt and appropriate distribution of written communications related to official business
- Voicemail and email responses in a timely manner with no more than a 24-hour response time
- Maintenance and organized storage of association files and records
- Maintain inventory of appropriate materials
- Preparation and distribution of written communications necessary to maintain coordination and liaise with the Board of Directors and various committees
- Coordinate printed materials necessary for business operations (e.g. letterhead, envelopes, business cards, etc.)
- Maintenance of association's master calendar
- Telephone answering service on exclusive client association line during normal business hours
- Office facilities and equipment

## SYSTEM & RECORDS MANAGEMENT

All records of AMG clients are maintained on a state-of-art Windows server. Our Barracuda Backup uses a triple redundancy process performed daily with copies stored both on and off-site on secured hard drives. This backup procedure is designed to ensure the security and integrity of client records.

AMG has a maintenance contract with J4 Systems to maintain the SQL server with an agreed 2-6-hour response for any issues. Since 1994, J4 Systems has been a network integrator specializing in providing business technology consulting; it employs experienced engineers with the highest-level engineering certifications and extensive experience working in multi-vendor/multi-technology environments.

AMG also employs an IT manager and a Database supervisor on-site to assist with issues related to equipment or specific client association management software.

AMG uses two payment gateways; Authorize.net is used for all e-commerce transactions and USAE Pay is used for mobile processing. Authorize.net has a low monthly flat rate fee with competitive rates that do not add a per transaction fee. USAE Pay is a secure mobile processor that also affords our clients the ease and convenience of on- site processing at events with no transaction minimums and fast funding using a secure PCI Compliant device. This provides for improved cash flow and an improved member experience.

## MEETING MANAGEMENT

AMG's event professionals have the knowledge and expertise to work alongside your organization's event planning committees to help plan and execute your next successful event, whether it is held in person or on a virtual platform. Services for meetings include:

- Board of Directors' meetings
  - Make logistical arrangements for appropriate meeting space for board meetings, including site selection/hotel contracting, menu selection, AV needs, etc.
  - Prepare and send advance written notice of meeting to appropriate individuals
  - Prepare and distribute agendas and materials in advance to board members
  - Coordinate presentations and participation by outside professionals
  - Adequately staff the meeting(s)
- Conferences, legislative/lobby meetings, workshops, educational sessions, chapter/local meetings, webinars
  - Assist with budget development, financial management, and appropriate pricing recommendations
  - Make logistical arrangements for appropriate meeting space, including site selection/hotel contracting, menu selection, AV needs, etc.
  - Facilitate exhibitor/attendee communication and promotion including artwork, brochure design, etc.
  - Work with committees/volunteer leadership to provide appropriate program topics and speakers
  - Manage exhibitor booth sales and onsite exhibit hall logistics
  - Coordinate legislative appointments with the association's advocate or lobbying firm
  - Receive and process all meeting registration payments, including attendee and exhibitor registration and sponsorship payments

- Prepare and distribute confirmations to registrants, exhibitors, and sponsors
- Provide various reporting as needed
- Coordinate, track, and maintain CEU (CME, SAMs, etc.) information as needed
- Provide onsite registration staffing, contractor coordination and hotel/site liaison management

## MEET THE AMG TEAM

### PRINCIPALS



#### **Gloria Peterson, IOM | Chief Executive Officer**

Gloria's association management career spans two decades. She has managed all aspects of client association relations and has extensive executive leadership and operational experience. She has managed a variety of associations including 501c6 and 501c3 organizations. Gloria provides executive leadership, acts as liaison with outside resources, manages professional alliances and oversees project management with an emphasis on communications, social media campaigns, print publications, website redesign, professional development projects, and membership development. She also has experience in working with government agencies for healthcare reimbursement, licensing and California sales tax issues. She is a member of the California Society of Association Executives and the American Society of Association Executives.



#### **Kimberly Andosca | Chief Financial Officer**

Kim is a results-oriented team leader with substantial experience in operations management, membership marketing, project management and publishing. She has more than 30 years' professional experience in senior nonprofit management positions, both statewide and nationally. Among her leadership accomplishments, she is experienced in nonprofit financial analysis and budget preparation. She continually manages the critical organizational and strategic components of many project management assignments and administrative challenges facing her client associations. Kim's longevity in the nonprofit arena has permitted her to develop a true understanding of every aspect of nonprofit work. She is a recognized authority and qualified expert in nonprofit organization development and management. Kim is a member of the California Society of Association Executives and the American Society of Association Executives.



#### **Robert J. Achermann, JD | Founder and Strategic Consultant**

A well-known and respected advocate, Bob has worked in government relations and association management for nearly 40 years. A founding partner of Advocacy and Management Group, under his guidance, AMG

continues to grow in its breadth and expertise. From Washington, DC to Sacramento, he has represented a variety of trade, industry and professional associations as well as individual corporations. He has extensive legislative experience, working with elected officials, state and federal agencies, and private industry, tackling difficult policy issues in the areas of healthcare, occupational licensing and regulation, business taxes and regulation. Bob assists our clients in navigating the state budget process and other state government funding issues. He has also led numerous association clients and provides them with unmatched executive expertise and guidance. Bob received a Bachelor of Arts degree in Government from California State University, Sacramento, and his Juris Doctor from the McGeorge School of Law. He is a member of the California Bar Association.

## ASSOCIATION EXECUTIVES



### **David Butler, IOM | Senior Association Executive**

Dave joined AMG in July 2015. He previously served nine years as CEO of Sacramento Metro Chamber-affiliated NextEd, a not-for-profit organization that works to develop employer education partnerships serving the six-county Sacramento region. Prior to NextEd, he served as the Sacramento Metro Chamber's Senior Vice President for Public Policy and Advocacy and as legislative staff for State Senators Tim Leslie and Cathie Wright. He served on the Rocklin City Council, to which he was elected in November 2012. He received a Bachelor of Arts degree in Political Science from UCLA in 1983.



### **Megan MacNee, CAE | Senior Association Executive**

Megan joined AMG in October 2019 and brings over a decade of experience in association and non-profit management. She's previously served in key roles at Donate Life California, the California Building Industry, and the California State Assembly. Megan graduated from the University of Southern California with her Master of Public Administration and graduated from the University of Redlands with a Bachelor of Arts in History.



### **Matthew Peralta, CAE | Senior Association Executive & Director of Marketing**

Matt brings nearly a decade of professional legislative, communications, and association experience. Committed to the association profession and community, Matthew serves on the communications and annual

conference committees of the California Society of Association Executives, and he earned his Certified Association Executive (CAE) credentials from the American Society of Association Executives in 2020. Matthew graduated from the University of California, Santa Barbara with a degree in Political Science.



**Katelyn Peyser | Association Executive**

Kate joined AMG in May of 2016 and serves as Deputy Executive Director for multiple clients, as the Creative Writer and Publications Manager. She is responsible for writing press releases, op-eds, talking points, and fact sheets, while managing and editing our clients' publications. Before joining AMG, she worked in the California Legislature as a Communications Consultant, specializing in writing and developing strategic messaging for policy proposals. Kate graduated from Sacramento State University in 2014 with a Bachelor of Arts in Public Relations.



**Anne Mullinax | Association Executive**

Prior to joining AMG in January 2020, Anne served for over 6 years as the Association Services Director for a Sacramento-based firm. Her primary clients included trade associations representing firefighters and veterans. In that role, Anne supervised all levels of services provided to the clients including fiscal, policy development, membership, grant management, and event planning. She also brings in excess of 15 years of experience in the public sector where she developed strong project management, budget, and Board governance skills. Anne received a Bachelor of Arts degree in Political Science/Economics from the University of Illinois, Champaign-Urbana.



**Nito Goolan | Accounting Manager**

Nito is one of the senior accounting managers at AMG. She has over 15 years of experience in trust account and non-profit accounting and more than 25 years of accounting experience. She has functioned in the capacity of Vice President of Finance and Controller managing a staff of 14 and multiple branch locations throughout the State of California and Arizona.





**Denise King | Accounting Manager**

Denise joined AMG in June of 2017 and brings over 36 years of accounting experience from various organizations. She is responsible for maintaining clients' accounting records, financial statements and annual budgets while preparing quarterly reports for board of directors meetings. Denise also has a degree in business administration.



**Theresa Lindroos | Accounting Manager**

Theresa joined AMG in August of 2021 and brings more than 20 years of accounting experience in both for profit and non-profit from various entities. She has a Bachelor of Science degree in Business Administration from California State University, East Bay. At AMG, she is responsible for maintaining clients' accounting books, financial reporting, budgets and annual audits and reviews. Outside of work, Theresa enjoys volunteering at the animal shelter, spending time with family and traveling..

## IT, OPERATIONS, AND COMMUNICATIONS



Ryan King  
IT Manager



Hannah Paige  
Digital & Social Media  
Manager

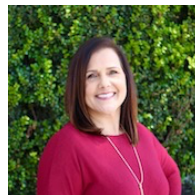


Jonathan Flom  
Communications &  
Publications  
Coordinator

## MEETINGS & EVENTS



Rachel Hickerson, CMP  
Meeting & Events  
Manager



Felicia Price, CMP  
Meeting & Events  
Manager



Becky McGuire  
Meeting & Events  
Manager



Natalie Perry  
Meeting & Events  
Manager



Julie Wallner  
Exhibits & Sponsorship  
Manager



Dena Silva  
Director of Continuing  
Education

## MEMBERSHIP & OPERATIONS



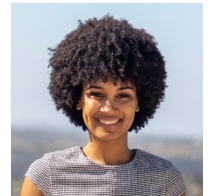
Amenda Yang  
Operations & Client  
Support Assistant



Evan Wise  
Membership Services  
Supervisor



Allie Johnson  
Membership Services



R'Mani White  
Membership Services



Jacob Gray  
Membership Services



Lisa Schulz  
Executive Assistant



*We also gratefully acknowledge the more than 20 additional AMG staff members who work on large client programs and projects.*

## DON'T TAKE OUR WORD FOR IT... HERE'S WHAT OUR CLIENTS SAY ABOUT AMG



**Karen Sibert, MD, FASA | Past President, California Society of Anesthesiologists**

"AMG's work for the California Society of Anesthesiologists over the past six years has been stellar, and has helped our organization thrive even throughout the pandemic. Under the leadership of Executive Director Dave Butler, we have improved our finances, increased our advocacy effectiveness, and even incorporated a foundation to help us with community outreach. The breadth and experience of the staff means that we have professional help with strategic planning, membership services, accounting, communications, leadership tools, and event planning always available for whatever we need."



**Sandy Walden | Past President, California Court Reporters Association**

"Since we've had AMG serving as our management company, they have taken the California Court Reporters Association to the next level. Gloria Peterson, along with the staff at AMG, cover all skillsets an association needs to run successfully. Our annual conventions have been profitable, planned without worry, and to the complete satisfaction of our board of directors and attendees."



**David Kusa | Past President, Automotive Service Councils of California**

"I have been part of ASCCA for 20 years. Gloria Peterson and the AMG Team have been working with ASCCA the entire time. As a Past President of ASCCA, Executive Director Gloria Peterson and our AMG Partners were with me and the Board of Directors the whole time. Their professional support and guidance kept us on track and helped the association create a strategic plan and reach our goals."



**Mark Yeh, MD, MBA, FACR | Past President, California Radiological Society**

"It has been a distinct pleasure and honor to have worked closely with Bob Achermann and his talented team at AMG both as an Executive Committee Member and Officer of the California Radiological Society

(CRS). Indeed, Bob and his team's deep knowledge of the political landscape in Sacramento has been the secret weapon that has allowed CRS to succeed in its mission to advocate for its members and the patients they serve. I have no doubt that CRS would not be the success it is today, one often emulated by other state radiology societies, especially in the current challenging economic and political environment without AMG as its backbone."



**John Eppstein | Past President, Automotive Service Councils of California, and Chair, ASC Educational Foundation**

"Gloria and her team at AMG do a great job of working with the Automotive Service Council of California (ASCCA) and their Educational Foundation (ASCEF). They have kept the leadership of the association and foundation focused and on task in an organized and professional manner. They run the day to day operations allowing the leadership time to work within the chapters with the members. AMG has been an amazing partner to both ASCCA and ASCEF for many years and we look forward to many more."



**Tim Hamill, MD | Past President, California Society of Pathologists**

"Bob Achermann at AMG has done an outstanding job of organizing and supervising our annual meeting for decades. The AMG team has provided the managerial, accounting, logistic, IT, meeting support, legislative analysis and advocacy in Sacramento that has been the backbone of our society. It has been AMG's support over the years that has allowed CSP to remain one of the strongest state pathology societies in the country and I hope CSP continues working with them for many years to come."



**Dr. Robert Vela | Past President, National Community College Hispanic Council**

"Kim Andosca and her AMG support team have been supporting the important work of our National Council for more than 16 years. The commitment and support of this professional management group has been invaluable to NCCHC and has assisted our small organization in making a big impact throughout the Country. Thank you for the many years of partnership and I look forward to many more."

## ADDITIONAL CLIENT REFERENCES

### **Automotive Service Councils of California**

John Eppstein – Past President and Chair of  
the ASC Educational Foundation  
John's Automotive Care  
(619) 280-9315

### **California Association of Medical Product Suppliers**

Dave Fein, President  
Shield Healthcare  
(661) 294-660

### **California Court Reporters Association**

Sandy Walden, 2020 President  
Contra Costa County Superior Court  
(925) 382-5749

### **California Funeral Directors Association**

Erlinda Valdez, Past President  
Wallin's Sanger Funeral Home  
(559) 875-6555

### **California Pawnbrokers Association**

Pat Rogers, Past President  
Perris Pawn  
(951) 443-1716

### **California Radiological Society**

Vivian Wing, M.D.  
Bay Imaging Consultants  
(925) 295-1512

### **California Society of Addiction Medicine**

Anthony Albanese, MD, FACP, DFASAM, Past  
President  
Veterans Affairs of Northern CA Office of  
Academic Affiliations  
(916) 825-4015

### **California Society of Pathologists**

Alfred Lui, M.D., Past President  
Pathology Inc., A Medical Corporation  
(310) 225-3145

### **Hearing Healthcare Providers California**

Don Tucker, Past President  
(951) 296-1600

### **Mosquito and Vector Control Association of California**

Joel Buettner, Past President  
Placer Mosquito and Vector Control District  
(916) 380-5444

### **National Community College Hispanic Council**

Dr. Jose Fierro, President  
Cerritos College President  
(904) 514-7299

### **Public Agency Risk Managers Association**

Karen Bianchini, Past President  
Managing Director, Risk Management  
CharterSAFE, California Charter Schools Joint  
Powers Authority  
(916) 880-3460

## **AMG CLIENT PROFILES**

### **AMERICAN MOSQUITO CONTROL ASSOCIATION**

Our mission is to provide leadership, information, and education leading to the enhancement of health and quality of life through the suppression of mosquitoes and other vector-transmitted diseases, and the reduction of annoyance levels caused by mosquitoes and other vectors and pests of public health importance.

*AMG Client Since 2019*

### **AUTOMOTIVE SERVICE COUNCILS OF CALIFORNIA**

ASCCA is supported by approximately 1,000 individual-owned automotive repair facilities in California. The core purpose of ASCCA is to elevate and unite automotive professionals. Membership in ASCCA is unique in that it is comprised of chapters throughout California.

*AMG Client Since 2006*

### **AUTOMOTIVE SERVICE COUNCILS EDUCATION FOUNDATION**

The Automotive Service Councils Educational Foundation (ASCEF) is a 501c3 charitable organization founded in 2001 to provide scholarships and financial assistance to students wishing to develop a career in the automotive field. The ASCEF has provided scholarship to 100s of students wanting to pursue a career in the automotive field. The funds raised provide scholarships and support sustainable training programs throughout California.

*AMG Client since 2006*

### **BOMA SILICON VALLEY**

BOMA Silicon Valley's mission is to represent and promote the interests of the Silicon Valley commercial real estate industry through leadership, advocacy, education, and cultivation of relationships.

*AMG Client Since 2021*

### **CALIFORNIA ASSOCIATION OF MEDICAL PRODUCTS SUPPLIERS**

CAMPS is an association of entities that dispense home medical equipment (e.g., wheelchairs, walkers, home respiratory equipment) and disposable medical supplies (e.g., catheters, incontinence supplies, urologicals) for patients' use in their homes or non-hospital settings based upon a prescription from a physician or other authorized



healthcare provider. These entities are licensed by the state as either home medical device retail facilities or as pharmacies.

*AMG Client Since 1985*

## **CALIFORNIA COURT REPORTERS ASSOCIATION**

CCRA continuously leads our industry through legislative advocacy, educational opportunity, and professional inclusion. We actively protect and unify the freelance, CART/Captioning, official, and student communities.

*AMG Client since 2019*

## **CALIFORNIA FUNERAL DIRECTORS ASSOCIATION**

CFDA is a trade association representing over 650 licensed funeral homes in the state of California. CFDA was established in 1904 and is dedicated to promoting dignity, respect, knowledge, and fairness throughout the death-care industry.

*AMG Client since 1999*

## **CALIFORNIA MASSAGE THERAPY COUNCIL**

CAMTC is a statewide voluntary massage therapy certification created by the California State Legislature. Voluntary certification through CAMTC allows for work in multiple California locations without the need for multiple massage therapy permits, licensing, and fees. Currently CAMTC has certified over 50,000 massage therapists.

*AMG Client since 2009*

## **CALIFORNIA PAWNBROKERS ASSOCIATION**

CAPA is an association of pawnbrokers and secondhand dealers and is the only one of its kind in California. CAPA's members are among some of the most regulated businesses in California; among its primary goals are to ensure members maintain the highest level of ethical conduct by following established best practices and are familiar with and adhere to a myriad of federal, state and local laws and regulations.

*AMG Client since 2013*

## **CALIFORNIA PUBLIC PROTECTION AND PHYSICIAN HEALTH, INC.**

The mission of CPPPH is to support a healthy physician workforce in the state of California. CPPPH is dedicated to enhancing patient safety by developing programs that

assist health professionals who identify, refer, treat, and monitor physicians with potentially impairing conditions.

*AMG Client since 2020*

## **CALIFORNIA RADIOLOGICAL SOCIETY**

CRS is a chapter of the American College of Radiology and is the statewide society of physicians who are board certified in radiology. The specialty includes both diagnostic imaging — x-ray and MRI — and radiation oncology — the use of ionizing radiation for treating cancer.

*AMG Client Since 1985*

## **CALIFORNIA SOCIETY OF ADDICTION MEDICINE**

The mission of CSAM is to advance the ethical and compassionate treatment of addiction through physician-led education of health professionals, patients, and the public. The Society promotes practice, research, prevention, and implementation of evidence-based treatment and sound drug policy. We advocate for our patients, their families, and other support systems at all stages of care.

*AMG Client since 2020*

## **CALIFORNIA SOCIETY OF ANESTHESIOLOGISTS**

The California Society of Anesthesiologists is a physician organization dedicated to promoting the highest standards of anesthesiology, fostering excellence through continuing medical education, and serving as an advocate for anesthesiologists and their patients.

*AMG Client since 2015*

## **CALIFORNIA SOCIETY OF PATHOLOGISTS**

CSP is the state society for physicians who are board certified pathologists. Pathologists usually practice in groups and direct hospital clinical laboratories or freestanding laboratories that provide clinical laboratory services and anatomic pathology, which is the examination of tissues via biopsy for diagnosis.

*AMG Client Since 1985*

## **HEARING HEALTHCARE PROVIDERS OF CALIFORNIA**

HHP is the state association of Hearing Aid Dispensers and dispensing Audiologists who are licensed by the Speech-Language Pathology and Audiology and Hearing Aid Dispensers Board, under the Department of Consumer Affairs. Hearing Aid Dispensers typically have small practices or franchise locations and are challenged by the changing marketplace. The association works to preserving the role of the Hearing Aid Dispenser in the overall hearing health of the hearing impaired.

*AMG Client Since 2011*

## **LOS ANGELES RADIOLOGICAL SOCIETY**

California Radiological Society and Los Angeles Radiological Society have partnered to add practice management, regulatory and legislative, and insurance subjects into the clinical educational program traditionally offered at LARS Midwinter. By joining forces to address both educational needs in one conference, we anticipate attendance to exceed 450 - combining LARS' attendance of SoCal private practice radiologists, radiation oncologists, residents and technologists with CRS' statewide draw including business managers and leaders and radiology professionals from neighboring Western states.

*AMG Client since 2017*

## **MEDICAL EDUCATION AND RESEARCH FOUNDATION FOR THE TREATMENT OF ADDICTION**

The mission of MERF mission is to prevent the harm done to patients by physicians who lack the knowledge, skill, and training to recognize and treat addiction.

*AMG Client since 2020*

## **MOSQUITO AND VECTOR CONTROL ASSOCIATION OF CALIFORNIA**

MVCAC's mission is to provide quality public information, comprehensive mosquito and vector-borne disease surveillance, training to high professional standards, and effective legislative advocacy on behalf of California mosquito and vector control districts.

*AMG Client since 2014*

## **NATIONAL COMMUNITY COLLEGE HISPANIC COUNCIL**

Established in 1985 as a 501c (3) affiliate of the American Association of Community Colleges (AACC), the Council is the nation's premier organization for preparation and support of Hispanic leaders in America's community colleges. The nonprofit, professional

organization is committed to delivering high quality leadership development experiences and providing Hispanics with opportunities to continue their personal and professional growth. The Council provides members with resources, networking and educational opportunities.

*AMG Client since 2013*

## **PLASTIC RECYCLING CORPORATION OF CALIFORNIA**

Plastic Recycling Corporation of California (PRCC) is committed to improving the quality of the environment and reducing solid waste through the recycling of polyethylene terephthalate (PET) beverage containers. Our primary objectives are to increase public awareness and the recycling rates for PET beverage containers; ensure stable end-use markets for all PET collected in California; increase the value of PET; and reduce the costs of its collection.

*AMG Client since 2018*

## **PUBLIC AGENCY RISK MANAGERS ASSOCIATION**

PARMA is a professional community of California public agency personnel with responsibility for risk management, and a network of risk management service providers. PARMA's mission is providing relevant, career-long educational opportunities, information on the latest risk management trends and best practices, and the resources public entities need to manage a broad spectrum of risk in an ever-changing environment.

*AMG Client Since 2014*

## **UNITED CHAMBER ADVOCACY NETWORK**

UCAN, Unified Chamber Advocacy Network, provides local chambers of commerce with an affordable way to hire their own lobbyist to help chamber leaders define and advance a state level policy agenda of primary importance to their members.

*AMG Client since 2018*

## PROPOSED SERVICES AND FEES

### NATIONAL SOCIETY OF IT SERVICE PROVIDERS

Based on our initial understanding of the needs of NSITSP, AMG will provide the outlined services for a proposed monthly fee of \$3,200 (\$38,400 annually) with a review of scope and management fees after 12 months.

Our proposal includes specialized services and appropriate staff assignments in each of the following AMG departments (see detailed description for each department above):

- Executive Management
- Meetings, Events, and Continuing Education
- Finance and Accounting
- Marketing and Communications (website, social media, email marketing, and publications)
- General Office Administration
- Systems/Records Management

#### **Contracting consideration**

These proposed services and fees are preliminary and based on our initial understanding of the complex nature of your organizational needs as outlined in your email and our conversations. We look forward to additional opportunities to continue our exploration of the specifics of services needed.

We would welcome you to tour our offices and to meet with our staff if and when that becomes appropriate.