

National Society of IT Service Providers (NSITSP)

Proposal for Association Management Services



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Executive Summary

We would like to thank you for the opportunity to submit a proposal for Management Services for your review.

History and ownership

TrimaxSecure was founded in 2013, in 10 years we have established partnerships with several not-for-profit and commercial membership based organizations, such as AMC Institute, Project Management Institute and ASI Advanced Solutions International (IMIS). We bring over 7 years of association management experience combined with 20 years of technology expertise and have a global footprint with offices in the US, Turkey and Australia. The company is privately owned and employs 30+ employees; we are a dynamic, quickly growing organization.

TrimaxSecure has been experiencing a significant and consistent growth every year and was spotlighted among [Minnesota's Top 50 Cloud Computing Companies and Startups of 2021](#).

Major lines of business services

We provide a complete solution set for Management Services to our clients. We offer a dedicated team of professionals to meet all your organization's needs. We have in-house customer success managers, event management coordinators, marketing specialists, graphic designers, project managers, and financial management specialists to support association management. All our staff are employed by the company directly, we bring outside consultants who serve as subject matter experts in specific areas on an as-needed basis. We provide a dedicated team to support associations and are able scale based on the association's demands and rhythm of business.

We stay in close contact with our team members working on client projects and ensure that they receive mentorship, training and necessary support to meet the client's needs. These measures help maintain a high quality of service for our clients and increase employee satisfaction. We have built a team of talented and high performing professionals who utilize the most current tools to exceed their goals.

List of services to support Association Management

- Membership Management
- Digital and Print Marketing
- Web Management
- Full cycle Event Management including conferences
- Enterprise Resource Planning Applications that include Bookkeeping, Taxation and Human Resources
- Operations, Business and Program Management

Outsourced services

We bring independent contractors to perform financial auditing services.

Technology to support Association Management

We have been using a vast array of modern technologies to provide effective Management Services. We utilize technologies already in use by associations as well as a proprietary solution built on Microsoft Dynamics platform that allows to fully manage different types of events, conduct attendee registration, receipt of payments and support websites, conduct marketing outreach with ease without substantial investments, or the need to recruit extra staff. This solution is used to manage and operationalize interactions of members, speakers, partners, volunteers and sponsors; associations gain substantial fiscal benefits and save time that could have otherwise been spent on non-profile tasks.

We have been using Microsoft 365 and Dynamics 365 CRM and Marketing applications to help manage projects, keep all parties organized and focused on the right tasks. We utilize marketing automation and analytics software to ensure greatest efficiencies.

Experience of working with organizations like NSITSP

We have been in a lasting partnership with PMI Minnesota Chapter, one of the top 15 largest chapters in the world, for the last 7 years. We helped the organization reap financial benefits after having transferred association management to TrimaxSecure, the chapter was able to accomplish the following:

- Complete their financials in positive for the first time in 5 years
- Generate additional revenue through job postings on the website
- Secure additional sponsorship opportunities
- Increase membership by 5% in the pandemic period while many other organizations lost members through offering hybrid and virtual meetings and member engagement opportunities
- Ensure positive experience for attendees and the leadership team during the annual events hosting 300+ attendees
- Ensure that the organization was able to quickly adjust to the new mode of work during the Covid-19 period without losing revenue by switching to virtual events
- Our work with PMI Minnesota has been acknowledged and recognized by Microsoft.

We have a strong Project Management methodology and have been working with PMI MN and other PMI Chapters. Our understanding and wealth of experience with PMI MN and other PMI Chapters offer substantial benefits to membership-based organizations.

How we will help NSITSP grow and be successful

Our team of dedicated digital marketers and the design team will help your organization build a larger audience, increase membership, and sponsorship. In addition, we can support the Organization volunteers in building content and aid in engaging with the audience by providing social media support (creative portfolio can be viewed at <https://trimaxsecure.sharepoint.com/sites/AMS>), an invitation email to view the site was sent to Karl Palachuk (administrator@nsitsp.com), please note that LiveID login is required to view the contents of the site.

Introduction

In this proposal, we would like to demonstrate that we are fully equipped to meet the requirements set by NSITSP and align with the goals you identified for your organization. We will support your organization by focusing on non-profile tasks so that volunteers can spend their time setting a strategic direction for the organization and leading.

- We will provide business and administrative support.
- We will provide operational support ensuring meeting hygiene and communication including scheduling, preparation, attendance, taking minutes and follow-up with the attendees.
- We will manage member and vendor communication.
- We will support membership growth through employing effective digital marketing tactics, building awareness and education with the target audience via social handles of your choice and a monthly newsletter. We also propose to use ads to augment your marketing outreach.
- We will ensure sound financial management and reporting to safeguard the fiscal health of the organization and that monthly reporting, budget preparation and credit card processing are fulfilled according to the schedules.
- We will help promote virtual meetings, ensure event follow-up with the attendees, reporting and evaluation with the stakeholders, if necessary

We can support all the services listed as required in your Scope of Services, our proposed staff is assigned, please review their resumes in the “Staffing Proposal” section of the RFP.

1. General Office	Proposed Staff
Phone: Voice Mail 24/7 with 1 business day response	Anna / Savannah
Email: Responses or re-routes generally provided within 1 business day	General service
2. Committee and Board Meeting Support	
Provide PM support to meetings by taking minutes and support board secretary in filing	Anna / Savannah
3. Financial Management	
Full bookkeeping and accounting of income and expenses	Anna / Savannah / Brad
Monthly reporting of P&L and Balance Sheet	
Coordination of budget preparation	
Oversight/management of credit card processing services	
4. Membership Support Services	
Database management	Anna / Savannah
Troubleshooting of member inquiries	
Interface with platform provider as necessary for support or feature requests	
5. Marketing and Communications	
Support marketing campaigns	Anna / Sophia
Provide regular social media updates	
Publish a monthly newsletter	

6. Programs	
Support Vendor Partner Program and other programs	Anna
7. Committee Support	
Schedule committee meetings	Anna / Savannah
Collaborate with committee chairs on agenda planning and meeting goals	
Attend and coordinate all virtual meetings	
Prepare and disseminate meeting agendas/materials	
Take and prepare minutes of committee meetings for approval	
Prepare and, when appropriate, complete a listing of follow-up/action item	

We would like to offer the following to help your organization achieve its goals, these services will not incur additional fees and should be considered a part of our proposal. To better support marketing efforts of your organization, we suggest the following:

- Three postings per week on Facebook, Twitter, and LinkedIn to promote topics that are relevant to your audience
- Posting on YouTube
- Monthly eblast to your members
- Use of the best technologies to better manage content
- Use of ads

Cost

Our proposed pricing for Management Services is \$4,000/month. If NSITSP prefers hourly rate, it will be set at \$65/hour. Please view example of the contract on <https://trimaxsecure.sharepoint.com/sites/AMS>). Our team will cover all required services specified in your RFP. This base cost does not cover any physical event support or specific expenses such as supplies, and materials strictly to be used by the NSITSP.

Additional Administrative Cost

Additional administrative costs will relate to managing and promotion of physical events (in-person events and conferences) should they become required, expanded scope of services should be negotiated at that time.

Staffing Proposal

Following is a list of roles we would like to offer for this project to be successful, some staffing changes are possible upon notice. Full resumes listing clients and detailed duties are available on <https://trimaxsecure.sharepoint.com/sites/AMS> and via the links below.

Role	Name	Skill Set and Resume	Location	Duties
Executive Director and	Anna Brown	Experienced Project and Program Manager	Seattle, Washington	1 person (TrimaxSecure) overseeing all aspects of the partnership

Practice Lead		<u>Resume, bio</u>		
Business Manager and Operations Support	<u>Savannah Wendell</u>	Experienced in managing business offices, providing operations support <u>Resume</u>	Minnesota	1 person (TrimaxSecure) working with NSITSP as the main point of contact to coordinate resources and services and provide PM and business management support
Marketing Specialist	<u>Sofia Garduno</u>	Experienced in Digital, Print and Social Media Marketing <u>Resume</u>	Minnesota	1 person (TrimaxSecure) to execute and coordinate all marketing related work
Bookkeeper	<u>Brad Schmid</u>	Experienced in managing routine bookkeeping activities as well as tax preparations and submissions (TrimaxSecure) <u>Resume</u>	Minnesota	1 person (TrimaxSecure)
Accounting Specialist	<u>Hakan Ozturk, CPA</u>	Experienced with Accounting and Audits	Minnesota	1 person (TrimaxSecure)

Transitioning Timeline

Following is what we consider to be part of transitioning from current Management Services provider to TrimaxSecure

- Access to NSITSP applications such as website, document storage, email, online marketing services
- Access to current and previous years records for membership, events and Sponsors
- Access to current financial processes
- Access to legal documents such as registration with the state and federal for change of address and registered agent
- Access to Financials such as tax returns, bank accounts, bookkeeping files
- Access to NSITSP documents and annual reports

If all necessary information and artifacts are provided, we will commit to completing the transition within 1 month.

Task	Details	Time to Complete
Transition Planning with NSITSP Leaders	<ul style="list-style-type: none">• Mode of transition• Involved staff• Articles	4 weeks
Detailed transfer of services from existing provider	<ul style="list-style-type: none">• Detail how tasks and timelines are currently being handled• Plan out how they will be transitioned• Who they will be assigned to specifying NSITSP and TrimaxSecure association	4 weeks
Review of existing contracts and contacts with Event Venues, Sponsors	Review and document contracts, contacts, and processes	2 Weeks
Transfer of Financials	Transfer of bank accounts, credit card services, Bookkeeping files	2 weeks

REFERENCES

Reference Table	
Contact Information	
Organization Name	PMI MN
Organization Size/Description	3000+
Contact Name	Manish Kalra
Title	President
Address	900 Long Lake Road, Suite 101, New Brighton, MN 55112
Phone	952-913-1277
Email	Manish.kalra@pmi-mn.org
Contact Information	
Organization Name	Sterling Home Association Management Services
Organization Size/Description	10+
Contact Name	Brandon Olson
Title	IT Director
Address	11660 Theatre Drive North, Suite 240 Champlin, MN 55316
Phone	763-746-0880
Email	brandon@sterlingrealtymgmt.com
Contact Information	
Organization Name	The National Transportation Institute
Organization Size/Description	10+
Contact Name	Mark Shaver
Title	COO
Address	PO Box 441 Mankato, MN 56002
Phone	612-263-9980
Email	mshaver@driverwages.com