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Proposal for Association Management Services for the National Society of IT Service Providers

AB Communities is a boutique agency with a handful of non-profit clients. We work to advance the mission of your association while improving finances and increasing value to members.

We believe in organic communities. There is a common bond that brought your group together, and this is the center of our attention, always.

Yes, we know governance and 990 tax returns and non-profit laws and all the other “musts” to efficiently operate your association. ***But the core value driving our work is building your community.***

Hence, our name: AB Communities.

“AB” is Angela Bedell, our leader, who has an amazing track record of growing membership, improving finances and drawing record attendance at conferences. With 20+ years of professional membership association experience, she has led numerous associations to record achievements.

If AB Communities were awarded this work, Angela Bedell would personally serve as Executive Director (her CV is included).

Three Important Questions:

1. What exactly will we do for NSITSP?
2. What will it cost?
3. What if it doesn’t work out?

1. What will we do for NSITSP?

AB Communities will provide Executive Director oversight and association management, general operations, financial management, membership outreach, member communications and regular social media content creation.

Specific work and tasks included in the management fee:

- 1) Provide security and confidence in financial matters for the Executive Director and Board.

- a) Create “dashboard” reports 3x per year that compare revenue and expenses to budgets and so you always know “how NSITSP is doing.”
- 2) Answer phone calls and respond to Board members from 9:00 am to 5:00 pm Eastern time. In the event of high call or email volume, all messages are returned within one business day. Respond to text messages from officers within one hour (unless after 7pm Eastern time).
- 3) Answer phone calls and respond to members’ email messages from 9:00 am to 5:00 pm Eastern time. All members are responded to within one business day, except on holidays when it may be two business days.
- 4) Curate and organize documents to meet nonprofit legal requirements and ensure all fiduciary responsibilities are met.
- 5) Proactively contact members who have not engaged with the association to increase member retention.
- 6) Assist Chair with Board agenda development and reports to expedite decisions and keep Board members well informed. Assist officers with report preparation to assure meaningful, strategically focused Board meetings
- 7) Have a staff person on every Board call to assist with minutes.
- 8) Conduct a monthly audit of the website to review and update content.
- 9) Maintaining two digital accounts (Facebook, LinkedIn or Twitter) with two original posts per month.
- 10) Send topical email communication as necessary to share announcements, etc.
- 11) Oversee elections, Bylaws adherence and other governance matters.
- 12) Keep meticulous records for membership and payments.
- 13) Provide archival-safe storage of important documents.
- 14) Maintain a curated cloud-based system of documents and key information that can be accessed by officers.
- 15) Maintain a mailing address and collect/manage and respond to mail received.

2. What will it cost?

Signing Fee: \$2,500
Ongoing Fee: \$2,900 per month.

Additional work and assignments outside the final agreement will be billed at \$30 per hour for administrative staff, \$75 per hour for creative staff and \$115 per hour for Angela Bedell. All work outside the agreement will be pre-approved by the President.

3. What if it doesn’t work out?

AB Communities contracts typically require payment equivalent to 90 days of fees if NSITSP would decide to terminate the agreement. NSITSP can terminate the agreement at any time, for any reason. If the agreement is terminated by NSITSP, Angela Bedell and AB Communities will have a 14-day period to transfer files and other information.

More Operations Information

We prefer to use a third-party, independent tax preparer. Our team is proficient in Quickbooks Online and we find that the transparency (for Treasurer, officers) is helpful. Our typical practice is to provide Boards a “Dashboard” so that they can view exactly where revenue and expenses are compared to budget.

We make it a priority that the Board understands where the money is coming from, and where it is going.

Membership growth is our specialty. We believe the following are necessary:

- a laser-focused strategy
- a robust benefit list
- specific messaging targeted at value-based segments (not demographics)
- a combination of tactics (digital, “snail mail,” outreach).

The first step would be a conversation with the officers, followed by information gathering from members, non-members and former members. The development of strategy would have to be a partnership between the Board and AB Communities. The team at AB Communities, however, is skilled at execution of membership campaigns.

More fine print:

Personnel working for Angela Bedell, LLC who are working on NSITSP meetings, programs or projects are the responsibility of Angela Bedell, LLC. NSITSP will incur no payroll fees or employee liability of any kind.

The accounting firm will be included in the Operating Budget, as approved by the Board of Directors, will be paid directly by NSITSP and their work will be coordinated and led by Angela Bedell, LLC. NSITSP will be invoiced by the 5th of the month for the upcoming month and the invoice will be paid within 10 business days.

Expenses related to mileage and special projects will be pre-approved by the Finance Committee (or designated individual) and reimbursed as submitted.

We would love to work with NSITSP!

Please direct questions to Angela Bedell on her cell at 913-269-9642.