



NSITSP Task Tracking

Priority Roles and Responsibilities (short term)

Item #	Project	Sub-tasks	Primary Owner	Support People	Priority	Status / Target Date
1	Finish November webinar	Post video on YouTube and website	Bolder Strategies	Karl	High	Need to finish posting, training needed
2	Finish December webiner	Post video on YouTube and website	Bolder Strategies	Karl	High	Need to finish posting, training needed
3	Vendor renewals	Email each vendor contact, send invoices	Vendor sponsors	Bolder Admin	High	Invoices sent, follow up emails and calls needed, Board discussion needed.
4	Membership renewals	Send out invoices	Bolder Strategies	N/A	High	On track, ongoing
5	Communication process	Communicate communication process	Task force	Committee chairs	Medium	Copy Admin@nsitsp.org on emails, include committees
6	Marketing plan	Write marketing plan	Marketing Committee	Board	Medium	Provide feedback on word map questions
7	Newsletter	Re-format newsletter, create content	Bolder Strategies	Marketing committee	Medium	Set a deadline, source content.
8	January webinar	Email membership, LinkedIn post	Bolder Strategies	Marketing committee	Medium	On track, webinar January 31st, Prep call next week
9	Social media posts	Create content for posts, post	Bolder Strategies		Medium	On track (Facebook, LinkedIn and X)
10	New member welcome kit	Compile files, email to new members	Bolder Strategies	Marketing committee	Medium	On track, going out.
11	Qtrly member meeting	Set date, email invites, set agenda, etc.	Bolder Strategies	Board, Com chairs	High	Continue quarterly, tent. 2nd Wed of Feb. Board item.
12	Trade Show List	Review & share, solicit attendees	Bolder Strategies	Members	Low	Email members to see who might be attending which shows.
13	Roles & responsibilities	Reconfirm roles & responsibilities	Task force	Board, Bolder	High	For next board meeting.
14	Regaining access to the bank account	Transfer funds to the new bank account.	Bolder Strategies	Treasurer	High	Need an update.
15						

NSITSP - Bolder Contract Scope of Service

Catagory	General Office	Expected Results / Status	Priority
Executive Management Services			
	• Bolder Strategies will assign an Executive Director who will provide oversight for the management team	Done	High
	• Actively participate in client board meetings	Ongoing	High
	• Represent NSITSP as the key contact for all operational needs of the organization	Be primary owner of day-to-day operations	High
	• Collaborate with the Board of Directors to ensure that the organization is fulfilling its mission	Provide advice on best practices on board activities	High

		• Provide regular updates to the Board of Directors regarding the organization's operations and performance	In management report	High		
		• Work with the Board of Directors to develop and implement policies and procedures that support the organization's mission and goals.	Ongoing	High		
	Board of Directors Meetings					
		• Prepare Executive report and Agenda	Distribute 3 work days before meeting	High		
		• Attend meetings. Board meetings are 4th Monday of each month for 90 minutes.	Under way	High		
		• For Board and for Committee meetings, Client's volunteers will be notetakers and post minutes to NSITSP website.	Under way. Bolder should review minutes	Medium		
	Financial Management					
		• General bookkeeping	Under way. Finance topics in board reports.	High		
		• Processing of accounts payable and receivable	Under way	High		
		• Follow-up on accounts receivable.	Under way	High		
		• Balancing bank account and Stripe and PayPal merchant accounts	Status?	High		
		• Preparation and dissemination of financial reports to Finance Committee and Board of Directors	Distribute 3 work days before meeting	High		
		• Budget preparation – with Finance Committee	Annual?	High		
	Membership					
		• Database management - Convert from current MemberPress web site	Board decide to wait on database transition	Low		
		• Renewal processing (mostly auto-payments). Members are automatically re-billed on anniversary	In process	High		
		• New member packets. Assemble and mail.	In process	High		
		• Recruitment	Bolder should own	High		
		• Attend committee meetings (Four committees. Generally, participation in six meetings per month)	Ongoing	High		
		• Prep/Execute quarterly all-member meetings	Ongoing	High		
		• Process meeting recording, etc. This includes embedding the recording in our web site along with transcription and chat.	Training under way	Medium		
		- Post on YouTube and promote on social media	Training under way	Medium		

		• Create and disseminate materials to be used as channel events	(i.e. collateral creation, distribution	Low		
	Marketing					
		• Maintain a "big list" of channel events. Contact organizers to see if we can get a table.	List created, will need updating	Low		
		Coordinate members to sit at tables/booths.	Based on which trade shows are being attended.	Low		
		• Produce videos and marketing funnels as needed to attract more members	Get input from Marketing committee	High		
	Social Media and Marketing					
		• Marketing/Social Media Presence. Goal is 1-2 times per day across Facebook, LinkedIn, and Twitter. Occasional posts to YouTube. (includes repeats.)	More training needed. Should be 1-2 times per week.	High		
		• Blogging / posting news. About 4-6 times/month.	Dependent content from members	Medium	Recommend to remove from list. Discussion needed.	
		• Manage Client's online Forums (very lightly used)	Very low member activity	Low		
	Other Activities Not In Contact					
		Create and track master annual calendar	Calendar exists, need to share	Medium		
General expected response times:						
	Expected Response Time	Comments				
Emails	48 hours - both directions	Dependent on Bolder shows, etc.				
Website post	5 business days	Dependent on Bolder shows, etc. Advise on expected delays. Training forthcoming.				