



**National Society of IT Service Providers (NSITSP)  
Association Management Report**

Presented for the April 19, 2024 Board Meeting

The following provides a high-level management report on the current month’s activities conducted by Bolder Strategies as well as indicates upcoming activities.

<b>Executive Management Services</b>	
Bolder Strategies will assign an Executive Director who will provide oversight for the management team	<ul style="list-style-type: none"> <li>• Nicole Singleton Norman continues to provide executive oversight for NSITSP</li> <li>• Nicole Singleton Norman or a Bolder Strategies representative participates in committee meetings</li> <li>• Currently working to schedule two pre-sessions before the in-person session in June 2024</li> <li>• Participate in pre-webinar meetings with Steve Kazan and speakers</li> </ul>
Actively participate in board meetings	<ul style="list-style-type: none"> <li>• Participated in March 2024 board meeting</li> <li>• Provided documents for the board meeting</li> <li>• Sent draft agenda to NSITSP President for input</li> <li>• Agenda sent to NSITSP board upon receipt of feedback from NSITSP President</li> </ul>
Represent NSITSP as the key contact for all operational needs of the organization	<ul style="list-style-type: none"> <li>• Manage all inbound emails for NSITSP</li> </ul>
Collaborate with the Board of Directors to ensure that the organization is fulfilling its mission.	<ul style="list-style-type: none"> <li>• Actively participate in committee meetings to ensure committees are working to fulfill their charges</li> <li>• Continued to encourage committee chairs to post their meeting minutes on the NSITSP website</li> </ul>
Provide regular updates to the Board of Directors regarding the organization’s operations and performance.	<ul style="list-style-type: none"> <li>• Presented management report as an update</li> <li>• Provide monthly financial statements to the board each month</li> <li>• Provided membership reports</li> </ul>

Work with the Board of Directors to develop and implement policies and procedures that support the organization’s mission and goals.	<ul style="list-style-type: none"> <li>Partner with the Board and committee chairs to implement policies and procedures aligned with the organization’s mission and goals</li> </ul>
<b>Board of Directors Meeting</b>	
Prepare Executive Report and Agenda	<ul style="list-style-type: none"> <li>Presented management report as an update to the full NSITSP board</li> <li>Emailed NSITSP draft agenda for input from the NSITSP President</li> <li>Agenda posted to NSITSP Website and emailed to board and committee chairs</li> </ul>
<b>Financial Management</b>	
<p>General Bookkeeping</p> <p>Processing of Accounts Payable and Receivable</p> <p>Follow-up on Accounts Receivable</p> <p>Balancing Bank, Stripe and PayPal Merchant accounts</p> <p>Preparation and dissemination of financial reports to Finance Committee and Board of Directors</p>	<ul style="list-style-type: none"> <li>NSITSP March 2024 financial reports have been completed</li> <li>Set up Siteworks for monthly payments from new account – set up as ACH</li> <li>Will set up website host and email management company with ACH monthly payments</li> </ul>
Budget Preparation – with the Finance Committee	<ul style="list-style-type: none"> <li>Completed in October 2023</li> <li>Approved by NSITSP Board November 2023</li> <li>Posted in QuickBooks Online</li> <li>No current action needed for April 2024</li> </ul>
<b>Membership</b>	
Database management - Convert from current MemberPress web site	<ul style="list-style-type: none"> <li>Bolder Strategies continues to manage membership database in MemberPress</li> <li>It was determined by Board and Finance Committee that NSITSP is not in the financial position to transition to a more robust association management platform – pricing for this has been shared</li> <li>No current action needed for April 2024</li> </ul>
Renewal processing (mostly auto-payments). Members are automatically re-billed on anniversary date.	<ul style="list-style-type: none"> <li>Reviewed membership notifications as they come into email account</li> <li>Assist NSITSP members as needed</li> </ul>
New member packets. Assemble and mail.	<ul style="list-style-type: none"> <li>Bolder Strategies manages the distribution of new member packets</li> </ul>
Recruitment	<ul style="list-style-type: none"> <li>Bolder Strategies continues to encourage free members to convert membership via email campaigns</li> <li>Bolder Strategies uses social media to encourage members to join at the professional level</li> </ul>
Attend committee meetings (four committees – generally six meetings per month)	<ul style="list-style-type: none"> <li>Participate in weekly update meetings with Management Task Force to discuss operational needs and upcoming initiatives</li> <li>Participated in badge task force meetings</li> <li>Bolder Strategies continues to participate in committee meetings</li> </ul>

	<ul style="list-style-type: none"> <li>• Bolder Strategies has encouraged committee chairs to participate in future board meetings to provide their own reports</li> <li>• Bolder Strategies sends reminders to committee chairs to post meeting minutes on NSITSP website</li> <li>• Committee chairs have been encouraged to use the recently developed committee report template</li> </ul>
Prep/Execute quarterly all-member meetings - Process meeting recording, etc. This includes embedding the recording in our web site along with transcription and chat. Also post on YouTube and promote on social media.	<ul style="list-style-type: none"> <li>• Started planning for Q2 Meeting – started marketing Q2 meeting</li> </ul>
Create and disseminate materials to be used at channel events	<ul style="list-style-type: none"> <li>• All exhibit booth materials are in the possession of volunteer leaders</li> </ul>
<b>Marketing</b>	
Maintain a “big list” of channel events. Contact organizers to see if we can get a table. Coordinate members to sit at tables/booths.	<ul style="list-style-type: none"> <li>• A list of 2024 channel events has been created and is monitored regularly</li> </ul>
Produce videos and marketing funnels as needed to attract more members	<ul style="list-style-type: none"> <li>• Working to identify vendor to get video edited</li> </ul>
<b>Marketing</b>	
Marketing/Social Media Presence. Regular posts across Facebook, LinkedIn, and Twitter. Occasional posts to YouTube.	<ul style="list-style-type: none"> <li>• Bolder Strategies continues to post on social media, monitor engagement, and respond as needed</li> <li>• Promoted April and May programming via email and social media (webinars, Legislative Q&amp;A, etc.)</li> <li>• Past month’s metrics from HootSuite will be provided to the NSITSP Board</li> </ul>
Blogging / posting news. About 4-6 times/month.	<ul style="list-style-type: none"> <li>• Bolder Strategies was advised that the blogs will continue to come from the volunteer leaders – These were to come from Amy and Karl and other committee chairs</li> <li>• No activity in April 2024 report from the management company</li> </ul>
Manage Client’s online Forums (very lightly used)	<ul style="list-style-type: none"> <li>• No activity to note in April 2024</li> </ul>

**Upcoming Activities:**

- Ensure website updates are being made – make changes as needed
  - Add new initiatives to website
- Bolder Strategies will continue outreach to existing “free” members via email campaign and promoting to prospective members via social media
- Promote upcoming May programming via email and social media (webinars, Legislative Q&A, etc.)
- Continue work with Badge Task Force to launch this program
- Design NSITSP marketing materials

- Create new Legislative marketing promotion for upcoming Legislative Q&A