



PRESENTATION TO THE

NATIONAL SOCIETY OF IT SERVICE PROVIDERS

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PRELIMINARY STATEMENT

The leadership of the National Society of IT Service Providers (NSITSP) has stated their need to hire a management company, one which can provide the outlined expected services, one which will provide a constant and concerned administrator, and one which will assist the association in growing and strengthening their organization, maintaining the passion for NSITSP's mission while providing the services that their members require in an economical and cost-saving manner. Total Management Solutions is ideally equipped to meet these parameters.

Total Management Solutions currently manages a state (New York) professional society of approximately 2000 members; a national association of women within one industry; an international scientific/political science society; two cooperative bakers' associations and two foundations. TMS also has had experience managing two other scientific, professional associations (one international dental and one medical technologists) and an international museum association. Total Management Solutions not only performs the customary management functions required by the organizations we represent, but also counsels its small but valued client base. Our intelligent and experienced staff brings a degree of concern and close working relationship not usually available. We take our client relationships seriously and personally. Our staff is very customer service oriented and will go out of their way to fulfill client requests.

Total Management Solutions will provide all services required to ensure that the membership of NSITSP receives all the benefits of belonging to the organization. The transition would be a smooth and overlapping procedure so that nothing "falls through the cracks." Each section of this proposal will outline the needed services, all of which TMS has the technology, experience and staff to provide.

WHY TOTAL MANAGEMENT SOLUTIONS?

These are the “Added Value” services that TMS provides to its clients. All the following are included in all TMS contracts without additional charge.

- TMS is an Accredited Management Company and complies with all the functional and ethical standards required.
- TMS has been in business for more than twenty-three years serving a wide variety of clients from associations of dentists, anesthesia technologists, clinical social workers, college professors, museum directors to several foundations.
- An AMCi study found that AMC managed organizations have the greatest average net assets and also exhibit the greatest steady positive growth when compared to organizations having their own staff.
- TMS is a boutique AMC. Our dedicated staff is proficient in virtual platforms, multiple databases and financial software packages as well as many operating systems for MAC and PC. Account executives will oversee all social media platforms using the guidelines put forth by the association.
- TMS will address any immediate challenges presented to the association in a timely manner with professionalism.
- Each client is provided with an account executive who is the point person for the organization. Every account executive has support staff as needed. All staff is cross trained to be knowledgeable about every account.
- TMS provides continuing education for its staff in governance, financial management and meeting planning.
- TMS has formed strategic partnerships with vendors who will give beneficial pricing to our clients.
- The vendors that TMS selects to partner with have been vetted and have submitted competitive bids.
- TMS provides consistency of staffing to respond to questions and to follow through on requests.
- All calls, e-mails and requests are answered within twenty-four hours of receipt (except for weekends and holidays). Additionally, all questions are resolved either with the first response or with a timely follow-up contact.
- TMS has vast experience in managing organizational budgets. Unless an organization starts with a deficit budget, TMS has held the budget line of each of its clients every year.
- TMS will prepare financial, and membership reports your organization needs to remain up to date on a regularly scheduled basis.

- TMS maintains cutting edge technology in its headquarters for our staff to use on behalf of our clients.
- TMS provides its clients with new and creative ideas for membership growth and retention, income enhancement and cost-saving features.
- Over 100 cumulative years of experience among our staff in the not-for-profit sector.
- TMS oversees accredited continuing education programs regularly with ease.

GENERAL OFFICE MANAGEMENT

Total Management Solutions will:

1. Maintain TMS's office address as the headquarters of NSITSP
2. Answer a dedicated telephone line Monday through Friday 9:00 AM to 5:00 PM Eastern Time (with the exception of holidays). Voice mail will pick up messages after hours. Provide a fax line.
3. Answer all messages within 24 hours of receipt. Respond to e-mail messages in the same time frame
4. Utilize Zoom or similar account for conference calls and virtual meetings
5. Provide e-mail addresses for all staff working with NSITSP
6. Store all historical documents (minutes, publications, financial documents) in accordance with the organizational document retention policy, at an off-site storage facility. If NSITSP does not have a document retention policy, TMS will assist in developing one. The cost of off-site storage will be billed directly to NSITSP. This cost usually amounts to about \$57 per month depending upon the number of boxes stored and the number of retrieval times.
7. Provide access to legal services (fees to be paid by NSITSP)
8. Maintain association insurances

FINANCIAL MANAGEMENT

Total Management Solutions will:

1. Maintain all accounts receivable and payable records, bank and investment accounts and other such financial records for NSITSP in accordance with Good Accounting Practices.
2. Prepare monthly financial reports for the Treasurer and Finance Committee
3. Prepare the annual budget in conjunction with the Treasurer, and distribute to the NSITSP Executive Committee/Board for approval
4. Do all banking, deposits and payment of bills; reconcile all bank accounts
5. Process all credit card receipts
6. Work with outside accountant and the Treasurer to prepare all required state and federal tax returns and registration requirements and assure that they are filed on time. We strongly recommend that outside accounting be used for filing the annual tax returns and state registrations since that becomes an over-sight of our performance. Total Management Solutions will work with an existing accountant, recommend an accountant local to TMS or obtain bids from several accountants, if that is desired.
7. Utilize QuickBooks for all financial records, transactions and reporting
8. Sign all checks in accordance with organizational policies/contract provisions. The maximum threshold for this will be at the discretion of the organization.

INSURANCE

Total Management Solutions will:

1. Secure policy for loss of conference revenue, if requested
2. Secure Directors and Officers Errors and Omissions insurance, general liability
3. Total Management Solutions carries Cyber Security Insurance which covers everything that is on the computers in our office and therefore, if selected, NSITSP data would be covered by our insurance. Additional Cyber Security Insurance specific to the organization will be recommended, but not required.

MEMBERSHIP SERVICES

Total Management Solutions will:

1. Assist NSITSP in attaining its annual membership target
2. Maintain a single database for all members, update database, process payments and respond to inquiries (TMS has other clients who are using MemberClicks and our clients are very satisfied. We would therefore recommend moving to MemberClicks.)
3. Maintain other databases as necessary (events, prospects, etc.)
4. Handle membership renewals (with two follow-ups); process new members
5. Prepare new member packets
6. Process applications for the Directory
7. Maintain list of channel events; contact organizers re tables
8. Support aggressive campaign to enroll new members
9. Prep/execute quarterly membership meetings; process recordings

COMMITTEE SUPPORT

Total Management Solutions will:

1. Schedule committee meetings
2. Assist in planning meeting agenda and setting goals
3. Attend all virtual meetings and take minutes
4. Prepare list of action items

BOARD MEETINGS

Total Management Solutions will:

1. Schedule, attend and facilitate virtual and in-person meetings (up to one Board meeting per month)
2. Develop and distribute agendas, materials and reports
3. Prepare and distribute minutes and action items

4. Facilitate the election process
5. Establish virtual orientation program for newly elected Board members
6. Provide guidance and direction to the Board in all governance areas

MARKETING/SOCIAL MEDIA

Total Management Solutions will:

1. Maintain a “big list” of channel events, contact organizers to obtain table, coordinate members to sit at tables/booths
2. Post news on Facebook, LinkedIn and Twitter’ 1-2 times per day (content to be supplied by members)
3. Blogging/post news about 4-6 times per month (content to be supplied by members)
4. Manage on line Forums

FUTURE PROJECTS

Total Management Solutions is willing to quote additional fees for any of the following projects if requested:

1. Membership Drives
2. Conference/Trade Show management
3. Online store
4. Program of certification
5. Legislative education materials
6. Training materials
7. Media Education materials
8. Develop lobbying program
9. Manage Investments
10. Development of Strategic Plan

THE PROPOSAL

Total Management Solutions prefers to charge on a flat fee basis rather than an hourly basis for the services it provides. This allows an organization to budget its costs evenly throughout the year and enables a steady income to TMS. Therefore, we will quote NSITSP a flat fee that will cover all the services outlined in the above proposal.

- Total Management Solutions Fee: TMS will provide the services as outlined in the previous sections of this proposal to NSITSP, for a fee of \$48,000 per year payable at the rate of \$4,000 per month.
- Monthly Payments: NSITSP payments will be made by direct deposit from NSITSP's account to TMS on the first of each month. If the scope of services changes (either more work or less) TMS will negotiate in good faith to adjust the fee.
- All Responsibilities: Responsibilities listed above will be handled by employees of Total Management Solutions. TMS will be responsible for paying all wages, payroll taxes, benefits, etc. for all employees.
- Transition Expenses: Total Management Solutions will charge the regular monthly fee plus an additional fee of \$500 per month during the transition period (for a total of \$4500 per month). This additional fee covers the extra time that it takes TMS staff to receive and set up the association's materials, arrange the files, get things ready for storage, supervise the installation of phone lines, etc. This transition period shall last no longer than two months.
- Additional Expenses: Direct expenses of an outside accountant, attorney and/or other professional consultants as approved by the NSITSP Board; offices supplies, telephone costs; staff travel (actual expenses for mileage, hotel, airfare, ground transportation and food); and postage; will be the responsibility of NSITSP and will be invoiced monthly. NSITSP will also be responsible for all web site hosting costs, e-mail services and storage fees. The cost, if any, of transferring membership data from current database to a new database (if needed) will be borne by NSITSP. If additional personnel beyond the one assigned is needed at a conference, the cost will be \$500 per day per person plus their travel, hotel and food.
- Insurances: Total Management Solutions will require NSITSP to provide a financial statement prepared by an outside accounting firm immediately prior to the transfer of office files and banking accounts to TMS. Further, TMS will require NSITSP to provide a certificate of insurance for Property & Liability and Directors & Officers Liability

coverage, which policies must be kept current throughout the term of its contract with TMS.

- Confidentiality: TMS and its employees will maintain in strictest confidence any information about NSITSP or its members which is confidential information, or which might reasonably be expected to be confidential, during and subsequent to the term of the contract.
- Term: The initial term of this agreement shall be two years. The contract shall be renewable for an additional two-year period unless either party, at least one hundred twenty (120) days prior to the expiration of the initial term, shall give written notice of its intention to either seek modification of the contract or not to renew. The same renewal provisions shall apply thereafter to each successive two-year period, with notice to be given within one hundred twenty (120) days of the expiration of each two-year term.
- Formal Agreement: This proposal is subject to the execution of a formal agreement, which TMS will prepare according to the provisions herein.
- Please note: The following statement has recently been added to the TMS web site:

"Total Management Solutions is committed to promoting and fostering a diverse and inclusive environment within its own company and within its client associations. TMS defines the concept of diversity to include race, ethnicity, gender, gender identity /expression, sexual orientation, religion, age and disability. We value the unique contributions of diverse individuals in all aspects of our company and our clients' associations. TMS is committed to continued education to promote diversity, equity and inclusion within its workforce and client associations."

TOTAL MANAGEMENT SOLUTIONS:

A PERSONAL APPROACH TO ASSOCIATION MANAGEMENT

Total Management Solutions will immediately make available to NSITSP, its Chief Executive Officer, Sheila Guston, to facilitate the transition from the current management to TMS.

TMS' staff will work with the leadership of the organization to assure a smooth transition.

After many years of executive leadership in the non-profit association field and as a top revenue producing executive in a non-profit hiring firm, Sheila Guston recognized the struggles facing trade associations, professional associations and charitable organizations. Many were fighting what appeared as a losing battle of declining membership and participation and funding shortfalls while dealing with increasing costs for management and staffing.

Total Management Solutions was founded in 2000 as a means to provide professional, personalized services to professional associations and charitable organizations seeking to address the issues of controlling management costs while effectively building their organizations.

Total Management Solutions is accredited by AMC Institute, the global trade association representing the Association Management industry.

Among the 500-plus Association Management Companies (AMC) worldwide, less than 25 percent have achieved and maintained AMC Institute Accreditation, demonstrating the commitment and the ability to deliver the highest level of professional management services to association and not-for-profit clients. Administered by AMC Institute, AMC Institute Accreditation is recognized and supported by ASAE & The Center for Association Leadership and is based on the ANSI Standard of Good Practices for the AMC Industry. Measurable performance practices include contracts and service delivery; employee recruitment, training and professional development; and financial management and internal controls, among others. AMCs must earn reaccreditation every four years, demonstrating to an independent outside auditor that they continue to meet the standard.

Cost-effective, individualized attention is TMS' primary goal. We carefully evaluate and negotiate payment structures to meet our clients' needs and apply our personnel most suited to the efficient production of the contracted tasks. Our productivity is enhanced by our technical capabilities, without losing the personal contact that our clients enjoy.

**OUR SPECIALTY IS ENABLING SMALL ORGANIZATIONS
TO REALIZE THEIR POTENTIAL.**

TMS principals are Certified Association Executives, whose expertise in a variety of non-profit management settings allows TMS to maintain the highest caliber of service to our clients.

TMS's primary office is maintained in northern New Jersey, within the New York metropolitan area.

TMS and its officers hold membership in the American Society of Association Executives and the Association Management Company Institute.

**OUR PHILOSOPHY IS THAT NO CLIENT SHALL EVER BE
WITHOUT TOP-LEVEL REPRESENTATION, ADEQUATE
STAFFING AND PERSONAL ATTENTION WITHIN THE CLIENT'S
BUDGETARY MEANS.**



Total Management Solutions is proud to be an AMCi accredited association management company. The Standards that an accredited company must abide by in order to maintain this designation can be found at:

[AMC Institute Standards](#)

These Standards ensure that TMS is providing excellence in management to our clients. TMS was originally accredited in 2010 and was reaccredited in 2014 and again in 2018 and 2022.

OUR TEAM

SHEILA GUSTON, BS, MA, CAE, PRESIDENT/CEO

A graduate of Fairleigh Dickinson University with a degree in education, Sheila earned her Masters' degree in Communications from William Paterson University. She founded Total Management Solutions, Inc. in 2000. Prior to that she had served as the Executive Director of two large international organizations, was the New Jersey Regional Director for a third organization and had many years of non-profit volunteer work. She has published several articles on non-profit subjects and has been a trainer on issues involving responsibilities of non-profit Boards, Strategic Planning, Budgeting and membership growth. She is currently working on the reorganization of one of TMS's clients and is also responsible for staff development, financial oversight and client relations.

DEBRA E. GUSTON, J.D., CAE, VICE PRESIDENT

A cum laude graduate of Mount Holyoke College, Deb holds a master's degree in Theatre from Emerson College and a J.D. from the Benjamin Cardozo School of Law. Deb's law practice focuses on non-profit management and formation, family building through adoption and assisted reproduction and family protection through estate planning and guardianship for special needs children and the elderly. Deb serves as an executive committee member of several boards of directors; is a Past President of the ACLU-NJ and the Academy of Adoption and Assisted Reproduction Attorneys; has conducted strategic planning sessions for organizations; has represented nonprofits in governance and litigation matters and is a Certified Association Executive. Deb is the Chief Operating Officer of TMS. She has been with TMS for 17 years.

KRISTIN KUENZEL, B.A., CHIEF OPERATING OFFICER/ACCOUNT EXECUTIVE

Kristin holds a B.A. in Communications from Glassboro State College. Kristin joined TMS after working in a financial planning firm. She has experience in planning events and seminars and managing customer service. She is the Account Executive for two of TMS' clients, overseeing their meeting planning, membership management, financial management and all communications. Kristin has earned her Non-Profit Management Certificate from William Paterson University and is studying for her Certified Association Executive designation. Kristin has been with TMS for eleven years.

SANDRA A. SQUILLANTE, ACCOUNT EXECUTIVE/BOOKKEEPER

A cum laude graduate of Russell Sage College, Troy, NY, Sandy holds a B.S. in Accounting. Sandy has worked for multiple companies in the accounting department throughout her impressive career. She also has administrative experience, which adds to her role as the Account Executive. Sandra joined TMS recently and is responsible for the accounting practices and customer relations for American Bakers Cooperative as well as the general bookkeeping for several of TMS's clients.

DEBBIE LEBNIKOFF, B.S. ADMINISTRATIVE ASSISTANT

The voice of TMS on the phone, Debbie graduated from Northeastern University with a degree in Communications. She has extensive experience in customer service, well developed computer skills and has worked with non-profit organizations. She is a dedicated and focused professional who excels at prioritizing, completing multiple tasks simultaneously, and following through to achieve project goals. Debbie's diversified skill set is what helps TMS remain organized and efficient.

PATRICIA F. NIXON, RN, NP, CCM, CONSULTANT

Pat is a registered nurse who is also certified as a Geriatric Nurse Practitioner and a Certified Case Manager. Pat has spent her career in management at some of the largest home health care agencies in New York City, including Visiting Nurse Service of New York. Experienced in all aspects of public health, Medicare and Medicaid programs and the needs of adult and senior populations with chronic health issues, Pat consults with TMS to better serve TMS's health care association clients.

JAMES FAY, B.A., WEB IT MANAGER

Jim serves as TMS's internal Web /IT manager. His responsibilities include all of TMS's social networking and working with clients on their event posting and web site enhancement. Jim holds a B.A. in History and Political Science from Rutgers University and received a paralegal certificate from Fairleigh Dickinson University. James has been with TMS for seven years.

GREG MACIAG, IT PROFESSIONAL

Greg is an IT professional with over 30 years of experience in the computer and networking field. Greg has worked with Apple, Cisco, Microsoft and various of other IT products. Recently has worked in banking sector involved in network security and IT infrastructure support. Greg consults with TMS for their IT needs.

KIM DAVIS SCIANCALEPORE, BA, MBA, BOOKKEEPING/CONSULTANT

Kim earned a degree in Economics and an MBA in Finance from the University of Connecticut. She started her career as an accountant at Citibank, N.A. She transitioned to income tax preparation while raising her 3 children. She has been the treasurer of many charitable organizations in her town of Hasbrouck Heights, including Cub Scouts, PTA, Music Parents, and Friends of the Library. Kim brings her accounting and bookkeeping expertise to TMS when reconciling bank accounts for our clients.

TESTIMONIALS

Here are some of the comments that our current and former clients have said about Total Management Solutions and our staff

- “TMS was extremely supportive of the members and the Board of Directors, advising and working with us to resolve many of the management and financial issues that had been neglected prior to their involvement. They have assisted us in identifying resources and services to provide for better communication with the membership and to help our society grow.” *Maretta Grandona, President, American Society of Anesthesia Technologists and Technicians*
- “TMS made our transition to an association management company easy and seamless; their extensive knowledge, broad experience and competent services enabled and supported us to do significantly more for our members, adding new value to membership.” *Jonathan Morgenstern, Past President, NY State Society for Clinical Social Work*
- “TMS worked hard to expand, update and carry out our marketing plan, respond to all membership inquiries and worked diligently to increase our membership.” *John H. Curtis, Past President, Association of Halfway House Professionals*
- “We have worked with TMS for over twelve years. During that time, our internal administrative systems have been substantially upgraded, membership communication has been modernized and maximized, and conference arrangements have been excellent. They are responsive to our members’ inquiries and offer creative solutions to our ongoing organizational dilemmas.” *Marsha Wineburgh, Past President NY State Society for Clinical Social Work*
- “TMS has always been available for our needs, responsible and effective in all the difficult problems we have presented. We look forward to a long and continued relationship with TMS as our management company.” *Richard Grosso, President Fund for Better Living*
- “I cannot say enough good things about the handling of the busy and demanding Society event yesterday. TMS is fortunate to have two such excellent people in its employ and NYSSCSW is equally fortunate to have them running our show. They were organized, efficient and managed to handle the inevitable problems with grace and ease. It was a successful event and I wanted you to know about TMS’s part in making it so.” *Richard B. Joelson, Vice-President, NY State Society for Clinical Social Work*
- “I have found Total Management Solutions and Sheila Guston to be very attentive to detail and a pleasure to work with.” *Daniel N. Uditsky, Past International President Alpha Omega Dental Fraternity*

- “The WFFC has been utilizing the management services provided by TMS for about 6 years. The service, quality and superior attention to detail is second to none. We have a dedicated account manager who is professional, attentive, and proactive while having great customer service skills. Overall, the WFFC cannot be more pleased with the level and caliber of service we receive from TMS.” *Adriana Becker, WFFC President: New Jersey Chapter*

REFERENCES

1. Jonathan Morgenstern, LCSW-R, Past President, New York State Society for Clinical Social Work, a 501(c)6 organization.
Email: mjonathanm@aol.com Phone: *
2. Shannon Boyle, L.C.S.W., Immediate Past President, New York State Society for Clinical Social Work, a 501(c)6 organization.
Email: Shannonboyle@hotmail.com Phone: *
3. Karen Kaufman, Past- President, Advanced Clinical Education Foundation, a 501(c)3 organization and current President of the NY State Society for Clinical Social Work Email: Karenkaufman17@gmail.com Phone: *
4. Adriana Becker, WFFC President, Women in Flavor and Fragrance Commerce, Inc., 501c6 organization.
Email: adriana.beckerwffc@gmail.com Phone: *

If a financial reference is required, please contact Gregory Scher at TD Bank in Franklin Lakes, NJ. His Email address is gregory.scher@td.com

*All references have asked that you email them to request a conversation by phone.

INSURANCES

Total Management Solutions carries the following insurances:

1. Directors and Officers Insurance (Professional Liability) \$1M all claims and Employee Practices Wrongful Acts
2. Workers Compensation - \$100,000/\$500,000
3. Employee Health Insurance
4. Employee Life Insurance
5. Cyber Security Insurance (covers all files, including clients', which are stored on TMS computers) TMS encourages each organization it collaborates with to carry their own Cyber Security Policy as well.

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TOTAL MANAGEMENT SOLUTIONS

TRANSITION TIMETABLE

As soon as possible after selection:

1. Conference with the officers to determine their priorities in reference to the transition
2. Conference with the officers to review existing files, databases, inventory, etc.
Arrange for the transfer of the membership database
3. Be sure a final audit/review has been ordered
4. Obtain the following:

| | |
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| Detailed list of accounts payable and receivable | Calendar of future events |
| Accountant's audit | Officers and chair list |
| Lists of any investments, certificates of deposit, bonds, etc. | All organizational documents federal ID number, copy of 501(c)6 determination letter, incorporation papers, copies of Form 990s, current by-laws |
| All insurance policies | Agendas and minutes from the last two board meetings, officers' meetings, annual meetings |
| Contracts with outside vendors | Treasurer's reports from last two meetings, officer's meetings, annual meetings |
| Copies of upcoming convention contracts | Current budget and annual financial reports |

One-month prior to date of transfer:

1. Transfer the following files to TMS control: membership and donor database, financial database, documents used on a regular basis (thank you letter, by-laws, sponsor letters, policy manual, strategic plan, etc.)
2. Order transfer of "800" number (if desired) or install new dedicated local telephone line
3. Prepare and send change of address and contact info notice
4. Obtain copies of printed materials (brochures, letterhead, logo, camera-ready artwork) and speak to printer (if one exists) for continuity of services
5. Open new bank accounts, corporate resolutions, obtain official signatures
6. Transfer management of website to TMS, review hosting costs

Two weeks prior to date of transfer:

1. Have all files, materials and inventory shipped to new headquarters office and storage
2. Review bank reconciliations from previous month
3. Transfer funds for deposit in new accounts
4. Request list of frequently asked questions from the administrator and be sure to have the answers
5. Transfer insurances to new address
6. Train staff regarding new client
7. Review and test all databases, procedures, etc.
8. Meet with new or existing accountant
9. Send out press release

F.A.Q.

The following is some general information that may augment your knowledge of Total Management Solutions and our policies and procedures:

1. Administration:

- a. Budgets managed range from \$40,000 to \$1,000,000
- b. Each of our clients is required to have an outside accounting firm review their books on an annual basis and prepare the Form 990 for filing with the IRS. This acts as a check on our work and is a best practice for all non-profit organizations. We can work remotely with any accounting firm that may be in place, or we can recommend a firm if one is needed.
- c. We have managed membership and conference registration databases for many organizations. The databases have included: iMIS, MemberClicks, Wild Apricot, Neon and Your Membership. We have also investigated other databases such as Star Chapter and have found them to be adaptable and easy to learn. TMS will recommend the most functional database for your organization and reserves the right to reject use of certain platforms that, in our experience, will prove too costly or unwieldy for our client.
- d. Our staff is proficient in all Microsoft Office Suite products. Our staff is also proficient in working with Word Press platform websites and managing Facebook and other social media platforms. We also manage a variety of list serve platforms. TMS is also fluent in many virtual platforms, such as Zoom, and Microsoft Teams.
- e. TMS has been in business for more than 22 years. We recognize that being a volunteer leader is sometimes difficult and we can provide the support and training to assist the Board in being strong strategic leaders.
- f. The staff of TMS recognizes that they are employed by TMS to service our clients. We have a very strong “customer service” attitude in our approach to each client.

2. Charity Management:

- a. Sheila Guston has worked with charitable organizations for over 30 years. She has helped them, both as a professional and a volunteer, to raise funds for their various causes. She is also very familiar with the restrictions placed on 501(c) 3 organizations by the IRS and provides guidance for her charitable clients in these aspects.
- b. When TMS managed the Alpha Omega Dental Fraternity, their budget was over \$500,000. They also had a Foundation with a similar budget. As the Executive Director of NA'AMAT USA, Sheila Guston managed a budget of over \$750,000

and supervised fund-raising activities on a national and chapter level. She helped to create their first nationwide fund-raising campaign.

- c. TMS has a staff that is very experienced in managing Board meetings and conferences. There are two Certified Association Executives on the staff and one who is studying to be certified. As such they have vast experience in handling the details of a conference, the governance of a Board meeting, conducting Board training and providing expert advice.