



***Connerly  
& Associates, Inc.***

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

May 19, 2023

## Overview

Connerly & Associates, Inc. is a Sacramento-based, family-owned and operated association management firm formed in 1973. The firm includes a staff of eight, each with a specialized emphasis, including legislative advocacy, communications, financial recordkeeping, event planning, membership and sponsorship, and social media.

The firm proudly owns its building in Sacramento, providing a long-term, stable location for our client base, with a large conference room and ample office space for growth and expansion.

Connerly & Associates, Inc. operates with the guiding philosophy that “you can’t place a price on integrity,” and the company mission statement is “Connerly & Associates exists so that associations run effectively and association members prosper.”

## Staffing and Logistics

Hiring an association management firm, unlike hiring an individual to handle all association duties, presents the benefit of having multiple specialists, each with expertise in a particular aspect of association management, rather than expecting one individual to wear many hats.

Connerly & Associates, Inc. will provide to the National Society of IT Service Providers (“Client”) an Executive Director, Administrative Assistant, Events Manager, Accounting Specialist, Communications Manager, Social Media Manager, and a Member and Sponsor Relations Manager.

Connerly & Associates, Inc. manages statewide, regional and local associations in three states, and has staff in Northern California, Southern California and Arizona, providing clients with experienced, knowledgeable and capable team members in close proximity to members and event venues throughout California and Arizona.

## Contact Details

Marc Connerly, President  
Connerly & Associates, Inc.  
2235 Park Towne Cir., 2<sup>nd</sup> Floor  
Sacramento, CA 95825  
O: (916) 485-6314 / C: (916) 214-6495 / F: (916) 485-6374  
Email: [mconnerly@connerlyandassociates.com](mailto:mconnerly@connerlyandassociates.com)  
[www.connerlyandassociates.com](http://www.connerlyandassociates.com)

## Scope of Services

Connerly & Associates, Inc. (Consultant) proposes to provide all labor and materials necessary to provide the following association management services to Client:

### Board of Directors Meetings

- Prepare Executive report and Agenda
- Attend meetings (1/month, 90 minutes each)

### Financial Management

- General bookkeeping
- Processing of accounts payable and receivable
- Follow-up on accounts receivable
- Balancing bank account and Stripe and PayPal merchant accounts
- Preparation and dissemination of financial reports to Finance Committee and Board of Directors
- Budget preparation – with Finance Committee

### Membership

- Database management (convert from current MemberPress web site)
- Renewal processing
- New member packets (assemble and mail)
- Attend committee meetings (6 meetings/month)
- Prep/Execute quarterly all-member meetings
- Process meeting recording, etc. (includes embedding the recording in NSITSP web site along with transcription and chat. Also post on YouTube and promote on social media)
- Create and disseminate materials to be used as channel events

### Marketing

- Maintain a “big list” of channel events; contact organizers to request a table; coordinate members to sit at tables/booths
- Produce videos and marketing funnels as needed to attract more members

- Marketing/Social Media Presence; 1.5 posts per weekday across Facebook, LinkedIn, and Twitter; occasional posts to YouTube
- Blogging / posting news (4-6 times/month; content provided by others)
- Manage online Forums

#### Transition Planning and Assistance

- Consultant shall organize, manage, and carry out transportation and transfer of all Client paper files, paper documents, and electronic files to Connerly & Associates, Inc.'s office in Sacramento.

#### Additional Services

- Consultant shall facilitate one full-day strategic planning meeting per year, providing Client with a written strategic plan within two weeks after the conclusion of the meeting
- Consultant shall provide Client with one Board orientation/Board training meeting per year (virtual, up to 90 minutes in length), covering Board expectations, staff roles, financial fundamentals, recap of strategic plan and organization mission and purpose

## Future Projects

Connerly & Associates recognizes that NSITSP is in the early stages of its evolution, and we are excited by the opportunity to help grow the association, and expand its programs, member benefits and activities.

We have extensive experience in growing the membership base and finances of organizations, and in expanding programming and member benefits, and we are very excited to develop the financial resources necessary to undertake the future projects identified in the RFP.

Our team has experience managing multi-day trade shows of 2,000 attendees or more, as well as fundraising golf tournaments, silent and live auctions, crab feeds, and other membership events.

We also have staff experienced in regulatory and legislative advocacy at the state and federal levels, management of simple and complex continuing education programs, press releases, online merchandise sales, and investments in the hundreds of thousands of dollars.

A core strength of our team is bringing ideas for programs, revenue growth, and membership growth that we have seen work with other organizations, and we look forward to sharing those ideas with NSITSP.

## Staff Roles/Responsibilities

**Brittany Connerly, Executive Director:** Primary Board point of contact, Board meeting and event attendance, development and distribution of meeting minutes, development of member benefits and programs

**Marc Connerly, Executive Advisor:** Staff supervision, counsel to Board, statewide and national advocacy, policy and program guidance

**Simone Youngblood, Communications Manager:** Coordination and implementation of all communications responsibilities (except social media)

**Kathleen Wade, Administrative Assistant:** Administrative support duties for all senior staff, social media management

**Supattra Connerly, Contract Administration:** Office management, Client invoicing, human resources, oversight of contract compliance

**Corinne LaFazia, Member and Sponsor Relations:** Point of contact for members and sponsors, maintenance of membership database, administration of member and sponsor recruitment programs, event attendance (as needed)

## Knowledge, Skills and Abilities

Staff is fluent and proficient in numerous software technologies and association management tools. Unless otherwise directed by Client, staff shall utilize the following technologies for execution of duties:

Wild Apricot – Membership database, event management, mass email communications;

QuickBooks – Financial recordkeeping;

WordPress – Website creation and maintenance;

Adobe Creative Suite – Graphics creation and modification;

Microsoft Outlook – Individual email communications and calendar;

Microsoft Word – Word processing;

Microsoft Excel – Spreadsheet;

Microsoft Publisher – Publishing;

Microsoft PowerPoint – Slide show presentations;

Google Workspace – Document editing and storage, various other apps.

## Compensation

Consultant proposes to provide the scope of services described above (excluding “Future Projects”) for the fixed monthly fee of four thousand dollars (\$4,000) per month for the first six months, increasing to four thousand nine hundred dollars (\$4,900) beginning in month seven.

Additionally, Consultant proposes to provide member recruitment and membership campaign management on a commission basis equal to 50% of net increase in membership dues, vendor revenues and other event and program revenues to a maximum compensation of \$10,000 per month (including fixed monthly management fees).

Reimbursable Expenses - The following expenses are charged in addition to the compensation detailed above:

Copies: \$0.10 per page

FAX: \$0.50 per page

Phone line(s)/long-distance: Actual cost

Vehicle travel: Current IRS mileage rate or actual cost of rental car plus fuel and tolls (whichever option is more economical)

Overnight travel: Hotels, airfare, meals at actual cost

## Client References

### California Statewide Associations

California Golf Course Owners Association (CGCOA)

President: Lee Finkel, CourseCo, (619) 559-1816

Past President: Michael Lautenbach, City of Anaheim, (714) 221-2729

California Speech-Language Hearing Association (CSHA)

Chair, Michele Linares, (818) 399-9199

Immediate Past Chair, Raquel Narain, (510) 366-5258

California Tire Dealers Association (CTDA)

President: Chris Barry, Independent Tire Dealer Group, (310) 251-9528

Past President: Billy Eordekian, 1-800EveryRim, (714) 308-4016

Roofing Contractors Association of California (RCAC)

President: Brett Maurer, Highland Commercial Roofing, (626) 826-6290

Past President: Christian Madsen, Madsen Roofing & Waterproofing, (916) 361-3327

### Bay Area/Northern California Associations

Golf Course Superintendents Association of Northern California (GCSANC)

President: Jay Neunsinger, Richmond Country Club, (858) 776-5207

Past President: Josh Lewis, Apex Golf, (541) 404-2516

Northern California Sports Field Management Association (NCSFMA)

President: Tim Youngberg, City of Mountain View, (925) 580-2481

### Other Regional Associations Within California

Golf Course Superintendents Association of Southern California (GCSASC)

President: Dan Cruse, Santa Ana Country Club, (864) 498-9408

Past President: Marc Lilleberg, American Golf, (360) 540-3504

### Statewide Associations Outside California

National Golf Course Owners Association of Arizona (NGCOA Arizona)

Chair: Don Rea, Augusta Ranch Golf Club, (602) 524-4506

Nevada Golf Course Owners Association (NVGCOA)

President: Tom Brooks, Carson Valley Golf Course, (775) 790-3136



## Appendix A - Client Quotes & Testimonials

On this and the following pages, please find quotes and letters of reference from our clients.

*"The Connerly & Associates team is top notch. Marc Connerly has proven over the last few years to be one of the true leaders in our industry. My appreciation goes out to the entire staff as well."* ~ Michael Lautenbach, City of Anaheim, CGCOA President

*"We all agree that Connerly & Associates is doing a great job."* ~ Fernando Villagran-Costello, Santa Rosa Golf & Country Club, GCSANC Past President

*"Getting an Assembly Bill written and signed into law by roofing contractors and for roofing contractors is a huge accomplishment. Yet, we were able to do just that with the help, guidance and strong political connections Connerly & Associates brings to the table."* ~ Dave Stefko, Eberhard Roofing, RCAC Past President

*"Since Connerly & Associates began managing our local association, we have realized an enhanced image...I can say without reservation that our local association would not be anywhere close to where it is today without the management of Connerly & Associates."* ~ Pat Hoffman, Associated Roofing Contractors of Northern California Past President



**PETRINOVICH PUGH & CO LLP**  
Certified Public Accountants and Consultants

October 13, 2020

NCPGC  
9630 Bruceville Road, #106-319  
Elk Grove, CA 95757

RE: Recommendation for Connerly & Associates

To whom it may concern:

I had the pleasure of working with Marc Connerly and Connerly & Associates during my tenure as a Board Member and Board Chair for the California Golf Course Owners Association. Connerly & Associates is the Association manager for the CGCOA. Marc and his team worked with me and the rest of the CGCOA Board during one of golf's most difficult periods: the unprecedented 8 year drought in California, culminating in 2015-2017 when mandatory water rationing throughout the California threatened the golf industry.

Marc and his team led the CGCOA and the Golf Course Superintendents Association of Northern California, in partnership with other golf organizations, on an education and lobbying undertaking that informed elected and appointed government officials and the general public of multibillion dollar annual contribution golf makes to the California economy, the number of people golf employs thought the State and the good environmental practices, including water conservation, that the industry practices.

Marc and his team led this emergency drought program in addition to all the "normal" Association manager duties including, but not limited, to education programs, fundraising events, and managing the association's finances. As a CPA by training, I especially appreciated Marc and his team's attention to detail and accurate financial reporting.

We have continued to work together as I left the golf industry and went back to the CPA world organizing educational events for the associations he manages.

Marc is efficient, ethical, well connected and a quality individual. Any group would be fortunate to work with him.

If you have any question, or I can be of further assistance please contact me at [rzraick@ppandco.com](mailto:rzraick@ppandco.com) or call my cell phone 408-893-5878. Thank you.

Sincerely,

Ron Zraick  
Director

333 W Santa Clara St. Suite 800 San Jose, CA 95113  
Phone: 408.287.7911 Fax: 408.297.7836

740 Front St. Suite 365 Santa Cruz, CA 95060  
Phone: 831.423.6500 Fax: 831.423.5206

[www.ppandco.com](http://www.ppandco.com)

October 2, 2020

To Whom It May Concern:

My name is Brian Boyer and I'm the golf course superintendent at Cinnabar Hills Golf Club. I also have the pleasure of serving on the Golf Course Superintendents Association of Northern California board of directors. Our association serves over 400 members and geographically covers from the Oregon border down just South of Monterey county and east to the central valley of California. In 2014 our Executive Director of 20+ years was set to retire and the board was tasked with hiring a new ED. When interviewing candidates for the position, it was clear that you got an entire team with Connerly & Associates. For our organization, Marc was to be the face of the operation, with someone to help with online content, someone for event planning, and a group in accounting.

Since their hiring, our organization has become much more streamlined through their standard operating procedures. Membership value has increased by increasing online content and bringing new opportunities and ideas to our organization. Event planning was a major pain in the past for the organization and their team has significantly reduced that source of frustration.

As much as our organization has grown since hiring Connerly and Associates, they are continually striving to make us a stronger organization. A lot of this is done through the far-reaching contacts that Connerly & Associates has within the industry and elsewhere.

I can recommend Connerly and Associates to manage any organization without reservation.

Sincerely,

A handwritten signature in black ink, appearing to read 'Brian Boyer', with a stylized, cursive script.

Brian Boyer



January 18, 2019

To: So Cal Chapter GCSA and Hi-Lo Chapter GCSA

From: Steve Plummer, CGCS

RE: Recommendation -- Marc Connerly, Connerly and Associates

Please accept this correspondence as a personal recommendation for Marc Connerly.

I was President of the California Golf Course Owner's Association at the time where we were in need of a new Executive Director for the organization who could get things moving in the right direction. A lengthy search and selection process was conducted by a committee, and Marc was the candidate hired.

In my opinion, the contracting of Marc Connerly as our Executive Director was the best decision made in my tenure involved with the board. Marc has organized and directed the association in a very professional manner; and in a very short time has developed relationships throughout the industry as the representative of our board. He is responsive to the needs of our organization and industry, and is well respected by our fellow golf organizations.

Marc has my full recommendation as a candidate for the open position to assist the board(s) in leadership of the GCSA Chapters. Please feel free to contact me if I can provide any further information.

Sincerely,

Steven J. Plummer, CGCS  
President, Championship Golf Services, Inc.  
Golf & Turf Business Manager, Agri-Turf Distributing  
Cell: 714-349-7486 / email: splummer@championshipgolfservices.com



January 15, 2019

GCSA of Southern California  
Mike Williams, President

Mr. Williams:

It has come to my attention that the GCSA Southern California is in the process of hiring a new Executive Director to manage your association. As a board member of the GCSANC since 2013, I am familiar with the transition to a new Executive Director. We went through a similar situation when Barbara Mikel retired. The board went through an extensive search and decided on Marc Connerly and Associates due to his experience running similar organizations, along with the staff he has available to facilitate all our needs more efficiently. I have personally worked with Marc since we hired him in 2014 and just finished my term as President. I would highly recommend Marc for the opening you have within your association. Please feel free to call me with any questions you may have.

Respectfully,

A handwritten signature in black ink that reads "Stacy L. Wallace".

Stacy L. Wallace, Bay Club StoneTree  
Past President GCSANC  
9 StoneTree Lane, CA 94945  
Cell: (707) 527-2254

*Golf Course Superintendents Association of Northern California  
2235 Park Towne Cir., 2nd Floor, Sacramento, California 95825  
(916) 485-6364 • [www.gcsanc.com](http://www.gcsanc.com)*

*The GCSA of Northern California is dedicated to serving its members through promotion and advancement of our profession.*