



Association Management Services Proposal

presented to the

National Society of IT Service Providers (NSITSP)



Bolder Strategies, Ltd.
www.bolder-strategies.com
(303) 500-5060

Member Focused.
Results Driven.

May 19, 2023

IMPORTANT NOTE

COPYRIGHT

The information in this proposal is considered confidential and proprietary information; hence, the reader and all parties related to the recipient organization are advised not to disclose any information from this document without the express written permission of Bolder Strategies, Ltd.

© 2007 - 2023. Bolder Strategies, Ltd.
Confidential and Proprietary Information



May 5, 2023

National Society of IT Service Providers (NSITSP)

Attn: Karl Palachuk and Christopher Barber

karlp@nsitsp.org; chris@cheaperthanageek.com

RE: Proposal to Provide Association Management Services for the National Society of IT Service Providers

Dear Karl Palachuk, Christopher Barber, and other NSITSP Board Members:

We truly appreciate the opportunity to submit our proposal to provide Association Management Services to the National Society of IT Service Providers (NSITSP). The purpose of this proposal is to provide an overview of Bolder Strategies and our capabilities with respect to meeting the needs of NSITSP; and, to ensure the association receives the support and attention it needs to effectively operate and grow. In this proposal, we have provided a summary of our qualifications, management approach, recommended services, proposed fees, and a client list.

Because of our successful and extensive experience working with other professional societies and trade associations, Bolder Strategies is the ideal fit for the NSITSP. It is our belief that the NSITSP would benefit from comprehensive management services including headquarters infrastructure, board development and support, financial management and reporting, general association management support, Web and technology support, membership support and development services, conference planning and management, program management, and marketing management.

Bolder Strategies stands ready to provide NSITSP with engaged leadership and management as NSITSP's operational partner. We know what it takes to drive organizations forward and to keep them relevant. We will assist NSITSP in developing and executing upon its strategic plan to serve as a compass in taking the organization to higher levels.

Bolder Strategies is uniquely qualified to provide the National Society of IT Service Providers with the services identified in this proposal as well as to assist in meeting the association's overall, day-to-day objectives. We are a fresh and original association management firm. Our leadership team infuses strong for-profit business development tactics into the unique characteristics of the not-for-profit sector. This results in our firm taking a "best of both worlds" approach to accomplishing our clients' goals and objectives.

Bolder Strategies, which changed its company name in 2020 to better align with its unique approach to association management, was founded originally in 2002. The company has extensive experience working with professional societies and trade associations. Bolder Strategies' management experience ranges from managing regional client organizations with 700-plus individual members to providing association management services to national and international associations with over 10,000 members. Bolder Strategies' capabilities are such that all projects are managed in-house with the exception of legal and auditing services as well as large-scale printing projects.

Bolder Strategies is committed to developing a strong and lasting relationship between our two organizations and will bring to bear our capabilities and resources to provide the National Society of IT Service Providers with a top-notch, comprehensive solution for professional association management. We pledge our commitment to exceeding NSITSP's expectations as they relate to association management. We know our future success depends on your satisfaction, thus making us true stakeholders in the National Society of IT Service Providers.

On behalf of Bolder Strategies' entire team, we look forward to working with you to ensure that the National Society of IT Service Providers and its programs are an unqualified success.

We welcome the opportunity to meet with your entire Board of Directors to further discuss our proposed relationship. Should you have any questions or require additional information, do not hesitate to contact us at (303) 500-5060 or via email to nsingleton@bolder-strategies.com.

Kindest regards,
Bolder Strategies, Ltd.

Nicole A. Singleton, MBA, MAC, Ph.D. Candidate
Managing Principal

TABLE OF CONTENTS



Project Requirements	06
Company Profile	07
Capabilities	14
Management Approach	17
Service Expectations	18
Qualifications Matrix	19
Initial Recommendations	23
Service Descriptions	25
Transition Schedule	29

TABLE OF CONTENTS, *Cont'd*



Financial Investment	36
Client List	37
Client References	39
Contact Information	40
Authorized Signature	41

PROJECT REQUIREMENTS



The National Society of IT Service Providers exists to serve as a resource for IT service providers by providing access to a member portal, quarterly meetings, newsletter, online membership directory, industry events calendar, and discussion forums to ensure professional development and information sharing.

NSITSP recently published and distributed a Request for Proposal for Association Management Services to meet its current and evolving needs. Bolder Strategies stands ready to provide the NSITSP with a comprehensive management solution to successfully lead the day-to-day operations of the association.

Bolder Strategies' organizational structure, operating procedures, and service culture will ensure that the National Society of IT Service Providers's key objectives are achieved. Bolder Strategies has proven experience in helping associations advance their presence in and value to their industry or field of

study, ensuring membership growth and retention, producing non-dues revenue, expanding sources of revenue through innovative product and service offerings, developing and maintaining a robust presence, and producing enhanced opportunities for its members.

We are very much interested in bringing our proven expertise to the National Society of IT Service Providers to ensure its continued success.



COMPANY PROFILE



Company Overview

Bolder Strategies is a full-service association management firm that provides management expertise and specialized services to trade associations, professional societies, cultural and social organizations, foundations, and charitable organizations. Founded in 2002, the organization remains true to its mission to drive ongoing, positive impact for its client organizations.

Our Vision

To be the most sought after non-profit management consulting firm in North America.

Our Mission

Bolder Strategies is committed to driving growth, creating value, and ensuring sustainability for our clients so that they may realize their fullest potential.

Our Values

Bolder Strategies' core values serve as a corporate compass guiding the organization's journey to its desired destination. These shared attitudes and beliefs determine how we interact daily with our client organizations and their constituents, our business partners, and each other. We are committed to living the following values:

We deliver quality.

We add value.

We do what we say.

We take prudent risks.

We challenge convention.

We work collaboratively.

We behave ethically.

We are performance-driven.

We encourage and promote diversity.

We have fun.



COMPANY PROFILE

Management Team

The following are biographies of Bolder Strategies' management team, who will ensure the National Society of IT Service Providers and its stakeholders receive top-notch service:

Nicole Singleton, MBA, MAC — Managing Principal/Senior Client Director

Nicole Singleton has nearly 30 years of experience providing business development, management, and marketing services to corporate, non-profit, and association clients throughout the United States. Ms. Singleton is a member of the American Society of Association Executives (ASAE). She has a Masters of Business Administration in Market Strategy from Regis University and her Masters of Applied Communication from the University of Denver. She is currently completing her doctoral studies in Management with a focus on Organizational Change and Leadership at Walden University. Additionally, Nicole Singleton earned a Certificate in Diversity, Equity, and Inclusion from Cornell University. In addition to her role as a Principal for Bolder Strategies, Ms. Singleton has served as an adjunct professor, where she taught graduate-level courses in management, leadership, and marketing. Ms. Singleton has served as the President, Chief Executive Officer, and Executive Director for chambers of commerce, foundations, and associations in the medical and health, manufacturing, publishing, construction, real estate, and higher education industries. She is a recognized expert in managing non-profit organizations of all sizes, as well as NSITSPIL, privately held firms. She advises on a variety of subjects including leadership facilitation and board development; governance and bylaws issues; relationship and coalition building; strategic planning; staff selection, motivation, and team building; membership development and retention; and, effective association and program marketing.

Barbara Hall — Operations Manager

Barbara Hall oversees the day-to-day operations of Bolder Strategies' client organizations. In this role, she works closely with client organizations (board of directors, committees, volunteers, and/ or chapters) and serves as the internal liaison with Bolder Strategies' various service units. With over 20 years of experience managing for-profit and non-profit organizations, Ms. Hall offers Bolder Strategies' client organizations her expertise in strategic planning, membership development, and communications. As the Operations Manager and Senior Client Relationship Manager, Barbara ensures client satisfaction and long-term engagements. Ms. Hall attended Eastern Michigan University.



COMPANY PROFILE



Danielle Jackson — Accountant

Danielle Jackson offers Bolder Strategies' clients nearly 20 years of experience in accounting and tax services. She is exceptionally proficient in developing program-based financial statements for non-profit organizations that enables volunteer leaders to easily monitor the business activities of their organization. Additionally, Ms. Jackson trains volunteer treasurers and other individuals in leadership on the intricacies of not-for-profit accounting and their fiduciary role within their organizations. Her efforts in financial analysis and budgeting have aided numerous organizations in becoming more structured and building a solid financial foundation to enable the organizations to carry out their mission. Prior to working with Bolder Strategies, Ms. Jackson operated her own accounting firm. She earned her Bachelor of Accounting from Regis University in Denver, Colorado.

Hari Yadav— Web and Technology Manager

Hari Yadav is Bolder Strategies' Web and Technology Manager, and is responsible for implementing strategic and operational business systems designed to achieve both the company's and its client organizations' information technology objectives. He is well versed in e-business application integration, systems architecture, business process improvement, and project management. Mr. Yadav has a solid track record in analyzing information system needs, recommending solutions, and implementing successful organization-appropriate outcomes. In addition, he manages the web development, data infrastructure, and web design for our client organizations. Mr. Yadav brings over 14 years of IT management and consulting experience working across multiple industries. He has a Bachelor in Science with a major in Computer Engineering from Tribhuvan University – Nepal.

Mead Woodard, Jr.— Creative Director

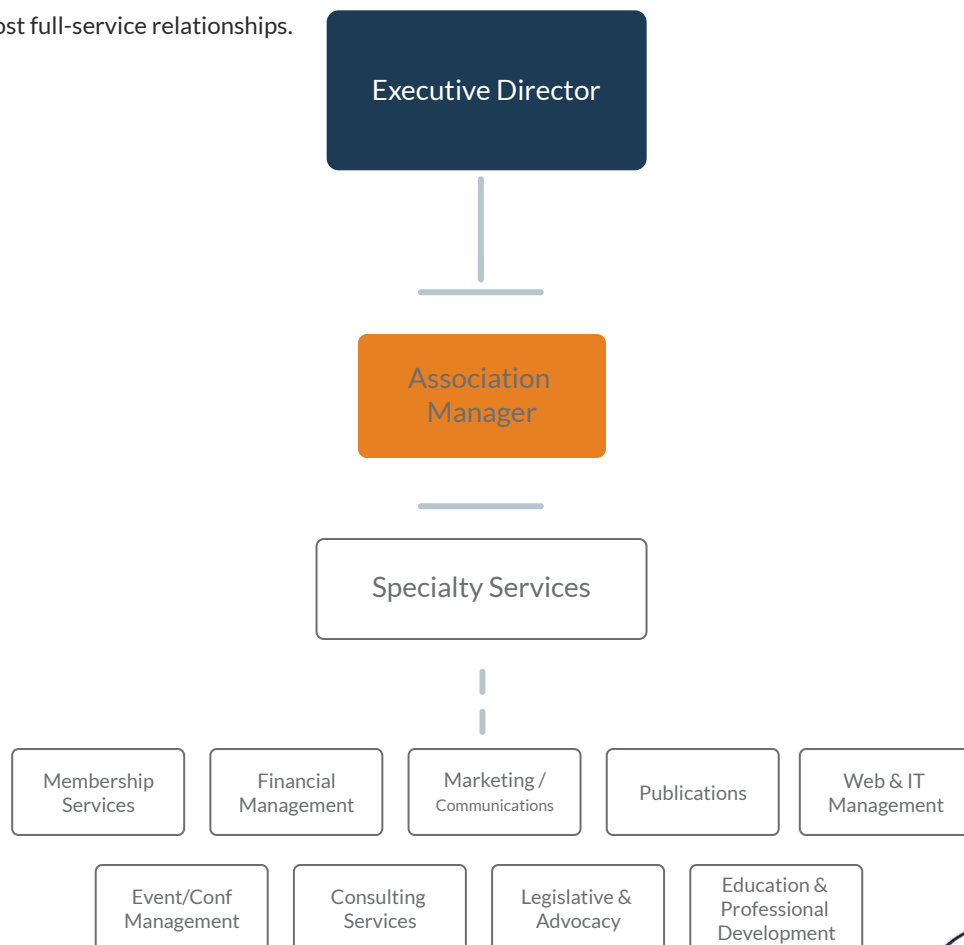
As the Creative Director for Bolder Strategies, Mead Woodard, Jr. offers over 15 years of marketing, communications, and design experience to our client organizations. He is an expert in integrated marketing communications, international and national marketing, branding, and website strategy. Mr. Woodard has implemented strategic marketing plans for Bolder Strategies' clients, which have included new branding initiatives, redesigned websites with content management systems (CMS), non-dues revenue generation implementations, and increased membership.



COMPANY PROFILE

Organizational Structure

Bolder Strategies structures each client relationship team to meet the unique needs of each client. The following depicts the organizational structure offered for most full-service relationships.



COMPANY PROFILE



Experience Foci

Bolder Strategies has provided comprehensive as well as function-specific services for associations in the following industries and fields:

- Higher Education
- Scientific
- Medical/Health Care
- Construction
- Architectural
- Engineering
- Remodeling
- Real Estate
- Aviation
- Water/Wastewater
- Chambers of Commerce
- Hospitality
- Legal
- Manufacturing
- Government
- Gift Planning/Development
- Publications
- Professional Sports
- Pet Care
- Professional Organizing
- Charitable Organizations
- Foundations

Client Budget Size & Assets Managed

Bolder Strategies manages the financial assets and budgets for all of its full-service clients. Bolder Strategies currently manages annual operating budgets ranging from \$400,000 to \$4.2 million.

Service Specialties

Bolder Strategies offers the following services:

- Full Service
- Headquarters Infrastructure
- Executive Management
- Governance Evaluations, Benchmarking & Training
- Leadership & Strategy Development
- Member & General Administration
- Financial Management & Reporting
- Accreditation & Certification Management
- Conference & Event Management
- Advocacy & Government Relations
- Marketing & Communications
- Market Research, Statistics & Analysis
- Publications Development
- Education & Programs
- Exhibit & Trade Show Management
- Chapter, Regional, and Interest Group Management
- Diversity, Equity & Inclusion Consulting
- Board Development & Consulting
- Web & Technology Management
- Interim & Transition Services



COMPANY PROFILE



Technological Resources

Bolder Strategies allows its client organizations to reap the benefits of leading edge technology. We constantly invest in advanced technology, so our clients can remain competitive. Bolder Strategies incorporates web-based tools and cloud environments, which promote efficiency, transparency, document sharing, and cost savings. Additionally, this allows organizations to be more nimble and responsive during unprecedented times. Despite the challenges many other organizations experienced during the recent pandemic, Bolder Strategies was equipped to pivot to a fully virtual environment as needed in order to fully maintain the operations and programming for each of its client organizations.

Facilities

Bolder Strategies is headquartered in the metropolitan Denver, Colorado area. The Denver International Airport provides easy access to all markets within the United States and internationally. This allows Bolder Strategies to effectively manage organizations of all sizes and easily access client organizations' members.

The office space is professionally designed and equipped. It includes a reception area, two sizable boardrooms, executive offices, project/breakout rooms, office space to allow for workstations that promote staff collaboration, and three large storage rooms to accommodate the storage needs of Bolder Strategies and its client organizations. Bolder Strategies' offices are secured and monitored 24-hours by on-site security personnel.

Furthermore, Bolder Strategies has regional, satellite offices in the following locations:

- Dallas, TX
- Vienna, VA (National Capital Office)
- San Mateo, CA
- Toronto, ON



COMPANY PROFILE

Employee Orientation

All new Bolder Strategies' employees, regardless of their position, experience a three-month orientation process, which includes training on Bolder Strategies and its service expectations as well as specific training to each client organization represented by Bolder Strategies. All staff members are trained to have a high-level understanding of each association client and how to answer the phones using the association-specific greeting.

Bolder Strategies' staff understands the company exists to service the needs of its client organizations' Board members, membership, and other key stakeholders. Hence, Bolder Strategies has a well-defined Customer Service Policy, which each Bolder Strategies employee is required to follow. This internal document can be made available upon request.

Commitment to Continuing Education

Bolder Strategies is committed to providing ongoing training and educational opportunities for its staff. As part of their ongoing performance evaluations, all employees are required to participate in at least one training/educational program each quarter.

Bolder Strategies employees actively take advantage of educational opportunities offered by industry associations such as state Societies of Association Executives, local chambers, ASAE Center, and the AMC Institute. The company also encourages Bolder Strategies' employees to participate in other third-party training programs to ensure that the team is constantly growing and learning.

In addition, Bolder Strategies maintains an in-house and web-based library of books, audio books, journals, and magazines that range in topics including customer service, marketing, fundraising, event planning, association management principles, and non-profit law.

CAPABILITIES



Bolder Strategies, a full-service association management company, is the perfect management solution for the National Society of IT Service Providers's needs. We understand what is required to successfully operate non-profit organizations and professional associations, and are committed to providing the resources and effort necessary to ensure the continued success of the organization. Bolder Strategies will commit the time and attention required to provide management services to the NSITSP both now and as the organization continues to evolve.

Bolder Strategies has proven success in membership recruiting and retention; identification and acquisition of sponsors; creation of innovative and revenue-generating programs that are organized around pertinent, industry-specific topics; effective design and management of events; implementation of impactful publications; and, developing and maintaining state-of-the-art websites and other marketing tools. We are able to draw from this wealth of experience to now benefit the NSITSP.

By servicing client organizations from diverse professions, industries and regions, Bolder Strategies is able to incorporate the lessons it has learned into its best practices, which it then leverages across its client organizations. We are able to and will certainly do the same for the benefit of NSITSP.

Bolder Strategies is a Limited Liability Company with extensive experience working with associations. Bolder Strategies' management experience ranges from managing regional client organizations with 700-plus individual members to providing association management services to international associations with over 10,000 members. Bolder Strategies' capabilities are such that all services are managed in-house with the exception of legal, auditing services, and large scale printing projects. When outsourcing such services, Bolder Strategies seeks competitive bids and selects the best qualified and most cost-effective vendor as needed.

Bolder Strategies is an active member of the American Society of Association Executives and the AMC Institute. Bolder Strategies is currently pursuing accreditation with the AMC Institute.



MANAGEMENT APPROACH

Bolder Strategies is committed to managing the National Society of IT Service Providers the way the Board desires to have it managed. Moreover, we will maintain NSITSP's unique identity as an autonomous organization with the Executive Board in control while the assigned management team conducts all business entirely in the association's name. In every way, we maintain NSITSP's position as an independent professional association—responsive to its constituents.

As indicated earlier in this document, Bolder Strategies is nothing like the traditional association management company. Under our management, we will not offer status quo management. Instead, NSITSP will experience and benefit from a personal hands-on touch, record growth, operational efficiencies, and innovative management.

For each of our clients, we effect a smooth transition and provide a carefully selected management team to administer your association. Nicole Singleton, whose brief bio is in the Company Profile section of this proposal, will serve as NSITSP's Senior Director with oversight for the assigned management team. Ms. Singleton will be supported by an Association Manager. In so doing, the assigned Association Manager will provide consistent communication and coordination with the Board of Directors to ensure that the objectives and mission of NSITSP are accomplished. Bolder Strategies' Association Managers provide organizational clients with the hands-on guidance and leadership necessary to ensure their continued development and sustainability.

The Association Manager is responsible for the day-to-day administration, constituent communication, maintenance of mailing lists and databases, and other administrative support tasks while supporting the designated management team. Furthermore, Bolder Strategies will provide the association with access to Bolder Strategies' various service departments when needed. Bolder Strategies' departments include: Finance and Accounting, Marketing and Communications, Advocacy, Publishing, Educational and Professional Development Services, Consulting Services, Conference and Event Management, and Web and Technology. With support from the assigned client services team and the various service departments, NSITSP can rest assured that each task will receive the thorough attention and devoted service it deserves.

For our full-service client organizations, within the first 90 days of contracting with an association, Bolder Strategies generally conducts an online membership survey to better understand the needs from the association's members' perspective. This will provide both Bolder Strategies and NSITSP with a baseline view of the association on which to continue to grow. From the data gathered from the survey as well as from conducting one-on-one sessions with Board members and committee chairs, Bolder Strategies will use this information along with NSITSP's strategic plan to serve as a compass to guide the association management company's efforts.





MANAGEMENT APPROACH

A designated phone number will be assigned to NSITSP and will be included on all communications to stakeholders. The Bolder Strategies' team will answer all calls in the name of the National Society of IT Service Providers and address all inquiries about the association.

Furthermore, Bolder Strategies will allow the National Society of IT Service Providers to reap the benefits of leading edge technology. Bolder Strategies constantly invests in advanced technology, so our clients can remain competitive. Bolder Strategies recognizes information systems as key tools in managing strategic planning, finances, meeting registrations, database maintenance, desktop publishing, and general administration.

Instantly boosting the association's level of service, Bolder Strategies will enable NSITSP to take advantage of the newest and most efficient hardware and software available to meet NSITSP's specific needs.

Because Bolder Strategies recognizes the significance and value of its clients' information and data, it has prepared a business continuity plan (i.e., a disaster recovery plan) to ensure the association's ability to function effectively and continue to service clients in the event of a catastrophic disruption in normal operations. These disruptions can arise from natural disasters, pandemics, equipment failures, mistakes and errors, as well as intentional or malicious acts. Although Bolder Strategies' team may not be able to prevent these events from occurring, the business continuity plan (BCP) exists to minimize the risk and overall impact to normal operations that might arise as a result of a disaster.

Towards accomplishing this goal, Bolder Strategies' BCP identifies specific functional areas and actions for each that should be undertaken in the event of a disruption to normal operations. The BCP identifies severe, potential disruptions, the impacts of each type of disruption, and responses to the disruptions so as to resume normal operations in the shortest amount of time. Specifically, the BCP:

- Documents the severity of a potential disruption based on its impact on Bolder Strategies' ability to operate and service its clients
- Addresses the information and procedures required to recover from a disaster
- Outlines critical business functions, systems, and processes
- Defines the resources required to support critical business functions and systems
- Outlines the requirements for a recovery site
- Identifies the individuals, resources, and suppliers needed to assist with recovery
- Lists documents that must be stored off-site to support the continuation of operations
- Addresses communication with clients, staff, and suppliers regarding status and resolution of the situation
- Identifies alternate methods for performing activities
- Documents periodic testing of the plan to ensure its effectiveness

MANAGEMENT APPROACH



Bolder Strategies' association management services will also enable the National Society of IT Service Providers to save money. Not only does Bolder Strategies provide a cost-effective solution to personnel, office equipment, headquarters space, and other budget considerations, we also enable your association to take advantage of our buying power. Combining the costs of multiple clients year after year strengthens our negotiating power, which—in turn—translates into instant access to better hotel contracts, technological resources, print quotes, mailing services, and more for your association.

In summary, our experienced, hands-on management approach will provide the National Society of IT Service Providers with a cost-effective solution and a higher degree of professionalism, management expertise, and technology.

SERVICE EXPECTATIONS

Client service is a high priority for all Bolder Strategies team members as we serve our clients and their organizational members. Bolder Strategies is dedicated to providing superior service through strong leadership and a partnership with volunteers and professional staff. The experience of clients, their members, potential members, customers, and the public encompasses all interactions with Bolder Strategies. This includes phone, in person, and written (mail or email) correspondence, data maintenance, event registration, event attendance, member application, payment procedures, website interaction, publications, and other marketing materials, meeting experiences, and more. These opportunities allow Bolder Strategies to exemplify behavior that builds a strong first and lasting impression and cultivate loyal relationships. All Bolder Strategies employees are expected to take personal responsibility to ensure all members, potential members, clients, and staff receive a timely, efficient, and professional response to their needs. Bolder Strategies associates strive to abide by the following guidelines for delivering superior client service:

TELEPHONE SERVICES

- All calls are answered with a welcome greeting that reflects a smile and appreciation for our clients, their members, and other stakeholders.
- Associates listen with the goal of understanding the caller's need prior to responding or transferring the call. Bolder Strategies' associates listen carefully and ask questions, as needed.
- When transferring calls, our company associates commit to properly directing the call, and when appropriate announcing the call to the person to whom it is transferred, and giving a brief description of the caller's need.
- When transferring calls into voicemail, our team member will inform the caller that the staff person is unavailable and that he/she is being transferred into a voicemail box of a staff person who will respond soon. Our team will seek to transfer to an available staff person instead of one who is out of the office for an extended length of time.
- Executive Directors/Account Managers will update support staff regularly on client's products, services, educational offerings, or any other priorities in order to better answer questions or triage calls from the client's members and potential members.

WRITTEN COMMUNICATIONS

- Bolder Strategies team members will include a proper salutation and standard client organization signature for all written communications.
- Our team responds to email inquiries in a timely manner, notifying the client or member if additional time is needed to resolve the issue or answer the question and provide a reasonable time for a resolution.
- Bolder Strategies' associates respond to the client's or member's need, not just what he/she requests. We aim to be succinct but thorough in our replies/solutions in order to provide the best service according to the identified need.

SERVICE METRICS

- Our company utilizes systems (and client accessible dashboards) to document and track each client organization's strategic priorities in order to best support achieving the organization's overall mission and goals.
- Bolder Strategies tracks client encounters with a goal of enhancing services.
- Our organization conducts an annual client service survey to track service performance and enhancement opportunities.

QUALIFICATIONS MATRIX

The following table considers the Scope of Services requested by the National Society of IT Service Providers and communicates that Bolder Strategies' qualifications not only meet but also exceed the organization's desired results. Bolder Strategies is eager to provide the comprehensive management solution needed by NSITSP in order to allow its board members to focus on key initiatives while the management office provides the hands-on, timely, and professional services needed to take the association to higher levels in management, operations, and membership experience.

By utilizing Bolder Strategies' comprehensive services, the association will experience cost savings, improved communications, and significant efficiencies by having all services performed by one entity.

Association Management

- Bolder Strategies provides comprehensive executive, operational and administrative services for its client organizations.
- Bolder Strategies' associates will answer NSITSP's phones in the name of the organization while maintaining the association's autonomy.
- Bolder Strategies will provide an extremely high level of customer service to all NSITSP's stakeholders.
- Bolder Strategies will provide a thorough, monthly management report that communicates the activity of the management team, proposed recommendations for the organization, and any actions needed on behalf of the Board.
- Bolder Strategies' extensive experience ensures cooperative and thorough communication with the NSITSP Board of Directors.

Financial Management

- Bolder Strategies provides financial management services that are managed by a team of accounting professionals, which are led by a Certified Public Accountant and supported by a Business Manager and bookkeepers.
- Bolder Strategies is able to assist NSITSP by providing comprehensive financial management services and timely reports allowing the association leaders to focus on key organizational issues instead of the day-to-day operations.
- Bolder Strategies' services provide a hassle-free management process that ensures proper accounting and financial management procedures are followed.
- Bolder Strategies' documented financial procedures ensure separation of duties and guarantee the best internal controls for NSITSP.

QUALIFICATIONS MATRIX

Membership Support Services

- Bolder Strategies' membership development and support services have resulted in increased membership bases for all of its client organizations.
- Bolder Strategies utilizes its strategic and creative marketing techniques to promote the membership opportunity to prospective and existing members.
- The management company's thorough follow-up and excellent customer service ensure the members' consistent engagement in the association.
- Bolder Strategies will assign an Association Manager, who will be responsible for promoting and supporting NSITSP membership and working collaboratively with the assigned Association Management team to provide top-notch service to the organization and its members.

Marketing & Communications

- NSITSP will have access to Bolder Strategies marketing and graphic design team on an as needed basis.
- Bolder Strategies will establish and implement a marketing plan for NSITSP to direct the marketing efforts of the organization. The plan will be aligned with the organization's overall strategic plan.
- Bolder Strategies will be able to assist NSITSP with all of its email campaigns, social media posts, publishing, and online marketing needs.

Technology

- Bolder Strategies has utilized association management software tools since it was founded to ensure effective organizational management
- NSITSP will experience a seamless transition as Bolder Strategies takes over the management of NSITSP's membership platform, website, and online directory

QUALIFICATIONS MATRIX

Meeting & Conference Management

- Bolder Strategies' team manages nearly 100 meetings, events, conferences, virtual meetings, trade shows, and webinars each year.
- NSITSP is able to take advantage of Bolder Strategies' negotiating power and conference industry contacts to experience significant savings.
- Bolder Strategies has been able to utilize its expertise in marketing to continuously grow the attendance and sponsorship base for its client organizations' conferences and events.
- Bolder Strategies provides detailed conference planning updates for the planning committee and/or Board for each event managed.
- Reporting mechanisms exist for and debrief sessions are held after each event.

Insurance Policy Management

- Bolder Strategies will ensure NSITSP will have the right insurance policy in place to protect the organization and its key stakeholders.
- The management company will shop for the best pricing on an annual basis to identify any potential cost savings.

Certification & Accreditation Management

- Bolder Strategies is well adept in managing certification and accreditation programs.
- The management company utilizes web-based methods for record keeping and tracking purposes.
- The company has enabled its clients to increase its value to its members by effectively operating such programs.

QUALIFICATIONS MATRIX

Diversity, Equity, and Inclusion Consulting Services

- Bolder Strategies' has invested in providing certification education in diversity, equity, and inclusion to key team members within the organization
- Bolder Strategies works closely with its association clients to ensure that its policies and practices are inclusive and equitable for all stakeholders
- Bolder Strategies also provides training for its association leaders, members, and other stakeholders on topics related to diversity, equity, and inclusion



INITIAL RECOMMENDATIONS

Bolder Strategies is committed to serving as the National Society of IT Service Providers's management partner and ensuring that the management team actively assists in taking the organization to higher levels. From this perspective, we will constantly look for ways to further develop the association. We will utilize our experience gained from working with other international, professional societies and trade associations to make an immediate impact in the management of NSITSP.

The following are just a few recommendations we have for taking the National Society of IT Service Providers to the next level. Note Bolder Strategies is able to implement any and all of the recommended projects for NSITSP:

Next Level for NSITSP - Infrastructure Development

- Assist the NSITSP in developing a strategic plan to guide the direction of the organization as well as the management staff's activities. Bolder Strategies stands ready to facilitate, manage, and execute the strategic plan to ensure continued focus on the aims and objectives of NSITSP's
- Bolder Strategies has the expertise and knowledge to provide annual and ongoing board training for NSITSP's Board of Directors and volunteer leaders.
- Utilize web-based and mobile app ready tools to facilitate strong communication amongst NSITSP's leadership, membership, donors, and other stakeholders.
- Conduct quarterly review meetings between a designated Board contact and the designated Association Manager from Bolder Strategies.
- Utilize Bolder Strategies' comprehensive services, which are available under one agreement— including conference and event management, financial management, web management services, graphic design, social media, and marketing services. We are open to supporting however needed by NSITSP.
- Work with NSITSP leadership to reduce some of its current operational expenses.

Next Level for NSITSP - Organizational Management

- Implement an aggressive and comprehensive marketing campaign to reinforce an understanding of the value of membership in the NSITSP to both recruit and retain members.
- Create and manage membership recruitment programs. We fully recognize that NSITSP caters to a niche market; however, we will ensure our membership promotion encourages outreach to those who are not yet members.
- Utilize QuickBooks Online to allow for increased transparency and real-time availability of financial reports. Bolder Strategies' team includes licensed, certified public accountants to manage the transition.
- Consistently and effectively, utilize social media to increase awareness and foster increased communication amongst NSITSP members and other stakeholders.





INITIAL RECOMMENDATIONS

- Provide hands-on, strategic leadership for the organization.
- Identify and execute additional non-dues revenue programs for NSITSP.
- Implement a platform that allows for proactive scheduling of social media posts.

Next Level for NSITSP - Mission Accomplishment

- Utilize proven experience creating a virtual community for all NSITSP stakeholders.
- Utilize public and media relations to promote NSITSP, its memberships, and its programs and events.
- Create videos to promote upcoming meetings, events, and programs.
- Ensure membership benefits and services are well communicated on website and other online forums.
- Encourage and support growth of future participants interested in this sector.



SERVICE DESCRIPTIONS

Towards meeting the National Society of IT Service Providers's objectives, Bolder Strategies proposes to offer a comprehensive association management solution on an ongoing basis. Bolder Strategies will commit the amount of time required to effectively meet the needs of NSITSP as well as the organization's overall objectives. Moreover, we are fully able to provide the services listed in your Request for Proposal.

The following provides a high-level overview of some of the services available when selecting Bolder Strategies to provide full-service management.

Executive Management

Successful management of an association requires a team of strategic and creative thinkers who have the ability to establish effective management and marketing strategies, accelerate revenue and membership growth, as well as maintain value-added service. At Bolder Strategies, our Association Executives ensure outcomes of this sort on a daily basis. They are effective communicators and problem-solvers, who are well-versed in all aspects of association management.

Under the direction of NSITSP's Board of Directors, the assigned Association Executive will be responsible for the administrative, financial, and management functions of the organization. This individual will become intimately involved with the association and committed to its overall success. Our designated Association Executive will:

- Provide a single-point of accountability for the effective implementation of the client organization's strategies, programs, and policies.
- Monitor the performance of the organization in achieving its objectives and goals.
- Ensure high-quality, reliable and responsive customer service for the association's members, volunteers, and other constituents.
- Represent the client organization to the media and outside world.
- Exercise strategic, proactive, and deliberate leadership for the benefit of the client organization.
- Attend and participate in all meetings of the Board of Directors as well as conferences and events.
- Represent the association and its governing body in accordance with the bylaws, policies, procedures, ethics, and culture of the association.

Member and General Administration

By managing the day-to-day administrative tasks of your association, we will reduce your efforts, make better use of resources, and free up your association's leaders to focus appropriately on your core issues. In so doing, Bolder Strategies will serve as the point of contact for your Board, members, and other constituents.

Providing valuable back-up support, we follow through with Board and committee members on action items and projects in progress. From an administrative standpoint, we will perform the following services:





SERVICE DESCRIPTIONS

- Provide frontline customer service to members, volunteer leaders, and others requiring information or assistance
- Coordinate board and committee communications
- Support board, committee, and task force activities
- Process and orient new members
- Create and implement impactful membership campaigns
- Manage member databases and dues processing
- Manage prospective-member databases
- Support general communications and announcements
- Maintain corporate documents and record
- Support Board/committee meetings through agenda planning, travel/ logistical support, minutes preparation, board-materials creation and onsite management
- Coordinate and manage special programs
- Provide access to legal services as requested and necessary
- Secure and maintain all required insurance policies on behalf of the association
- Product and collateral inventory management

Marketing and Communications

Regardless of your project needs—from re-branding your association to membership marketing and publication development—Bolder Strategies delivers the talent and experience associations need to catch their target market's attention and succeed in this competitive and ever-changing environment. As a team, we work closely with our client associations to guarantee that we achieve their marketing and communication goals. We have the expertise to provide the following services:

- Marketing Planning and Strategy
- Membership Recruitment and Retention
- Meeting and Event Marketing
- Publications and Communications
- Public and Media Relations
- Branding
- Graphic Design
- Copywriting
- Promotional Materials
- Social Media Management
- Content Management
- Video Creation
- Email Campaign Marketing
- Online Advertising and Promotion



SERVICE DESCRIPTIONS

Market Research and Statistics

With many challenges facing associations, making informed decisions based on objective data is critical to the ongoing success of these associations. Market research is utilized to better plan for an association's marketing, member services, and product/service development

- Needs assessment surveys
- Member satisfaction surveys
- Prospective member surveys
- Readership surveys
- Trade show audience surveys
- Environmental scans
- Industry profiles
- Benchmark studies

Meeting and Conference Management

Because the association's events and meetings are a critical part of their non-dues revenue stream, it is important that these are well planned and managed. Bolder Strategies will work with your Board or designated committee to create an enjoyable and educational experience for all event attendees. In addition, our client associations are able to take advantage of our buying power. Combining the costs of multiple clients year after year strengthens our negotiating power, which—in turn—translates into instant access to better hotel contracts, print quotes, mailing services, and more for your association. Our event management services include:

- Creative concept development
- Site and facility selection
- Vendor selection and negotiation
- Conference/event scheduling
- Event budgeting/financial management
- Food and beverage selection
- Trade show, exhibit and sponsorship sales
- Virtual Conference and webinar management
- Continuing Education Unit credit administration
- Exhibitor/attendee marketing
- On-site management and coordination
- Conference materials development
- Event, display, and exhibit design
- Registration services
- Promotions and gifts
- Event reporting

Education and Professional Development

One of the greatest reasons for joining an association is to take advantage of the professional development opportunities made available through the association. Bolder Strategies has extensive experience overseeing certification and accreditation programs as well as implementing in-person, online, and web-based educational programs for its client organizations.



SERVICE DESCRIPTIONS

Financial Management and Reporting

Bolder Strategies provides its clients with comprehensive financial management services. Bolder Strategies' primary objective is to maintain a framework for each client organization that ensures financial stability and viability. Our financial management services include:

- Billing dues and other revenue sourceNSITSPNSITSPNSITSPs
- Disbursing funds for authorized expenses
- Maintaining all financial records
- Providing monthly, quarterly and year end financial statements
- Budget preparation and tracking
- Investment monitoring and reporting
- Ensuring proper insurance coverage for client organizations
- Arranging for regular financial audits

Web and Technology Management

Bolder Strategies allows its client organizations to reap the benefits of leading-edge technology. We constantly invest in advanced technology, so our clients can remain competitive. Information systems are key tools in strategic planning as well as managing finances, meeting registrations, database maintenance, desktop publishing, general administration, and member services. Instantly boosting your level of service, Bolder Strategies will enable your association to take advantage of the newest and most efficient hardware and software available to meet your specific needs. Our Web and technology services include:

- Website design
- Web maintenance
- Content Management Systems (CMS)
- Member management database
- Online presentations
- Discussion groups
- Mailing list management
- Electronic marketing
- E-commerce
- Online registrations
- Online polls and surveys
- Webinars
- Podcasts
- Mobile Applications
- Mobile Sites
- Virtual Conference & Webinar management

Consulting Services

Our aim is to ensure the proper development and growth of each of our client organizations. Bolder Strategies' consulting division is able to assist client organizations with strategic matters and its training needs. Areas of consulting expertise include:

- Board Development & Training
- Financial Review & Assessment
- Strategic Planning
- Organizational Assessment
- Diveristy, Equity & Inclusion Consulting

Transition Plan
Academy
June 2017 - June 2018

Key tasks and milestones visible in the plan include:

- Academy Project Management** (June 2017 - June 2018)
- Academy Curriculum Development** (June 2017 - June 2018)
- Academy Marketing Strategy** (June 2017 - June 2018)
- Academy Operations** (June 2017 - June 2018)
- Academy Financials** (June 2017 - June 2018)
- Academy Legal** (June 2017 - June 2018)
- Academy HR** (June 2017 - June 2018)
- Academy IT** (June 2017 - June 2018)
- Academy Facilities** (June 2017 - June 2018)
- Academy Security** (June 2017 - June 2018)
- Academy Compliance** (June 2017 - June 2018)
- Academy Quality Assurance** (June 2017 - June 2018)
- Academy Risk Management** (June 2017 - June 2018)
- Academy Sustainability** (June 2017 - June 2018)
- Academy Social Responsibility** (June 2017 - June 2018)
- Academy Innovation** (June 2017 - June 2018)
- Academy Research & Development** (June 2017 - June 2018)
- Academy Partnerships** (June 2017 - June 2018)
- Academy Community Engagement** (June 2017 - June 2018)
- Academy Public Relations** (June 2017 - June 2018)
- Academy Media Relations** (June 2017 - June 2018)
- Academy Crisis Management** (June 2017 - June 2018)
- Academy Business Development** (June 2017 - June 2018)
- Academy Sales & Marketing** (June 2017 - June 2018)
- Academy Customer Service** (June 2017 - June 2018)
- Academy Logistics** (June 2017 - June 2018)
- Academy Supply Chain Management** (June 2017 - June 2018)
- Academy Procurement** (June 2017 - June 2018)
- Academy Inventory Management** (June 2017 - June 2018)
- Academy Distribution** (June 2017 - June 2018)
- Academy Retail Operations** (June 2017 - June 2018)
- Academy Wholesale Operations** (June 2017 - June 2018)
- Academy E-commerce Operations** (June 2017 - June 2018)
- Academy Mobile App Development** (June 2017 - June 2018)
- Academy Website Development** (June 2017 - June 2018)
- Academy Social Media Management** (June 2017 - June 2018)
- Academy Content Marketing** (June 2017 - June 2018)
- Academy Email Marketing** (June 2017 - June 2018)
- Academy SEO** (June 2017 - June 2018)
- Academy PPC** (June 2017 - June 2018)
- Academy Analytics** (June 2017 - June 2018)
- Academy Reporting** (June 2017 - June 2018)
- Academy Dashboard Development** (June 2017 - June 2018)
- Academy Data Mining** (June 2017 - June 2018)
- Academy Data Visualization** (June 2017 - June 2018)
- Academy Data Security** (June 2017 - June 2018)
- Academy Data Governance** (June 2017 - June 2018)
- Academy Data Privacy** (June 2017 - June 2018)
- Academy Data Retention** (June 2017 - June 2018)
- Academy Data Archiving** (June 2017 - June 2018)
- Academy Data Backup** (June 2017 - June 2018)
- Academy Data Recovery** (June 2017 - June 2018)
- Academy Data Migration** (June 2017 - June 2018)
- Academy Data Integration** (June 2017 - June 2018)
- Academy Data Interoperability** (June 2017 - June 2018)
- Academy Data Portability** (June 2017 - June 2018)
- Academy Data Accessibility** (June 2017 - June 2018)
- Academy Data Usability** (June 2017 - June 2018)
- Academy Data Reliability** (June 2017 - June 2018)
- Academy Data Accuracy** (June 2017 - June 2018)
- Academy Data Completeness** (June 2017 - June 2018)
- Academy Data Consistency** (June 2017 - June 2018)
- Academy Data Validity** (June 2017 - June 2018)
- Academy Data Integrity** (June 2017 - June 2018)
- Academy Data Confidentiality** (June 2017 - June 2018)
- Academy Data Availability** (June 2017 - June 2018)
- Academy Data Security** (June 2017 - June 2018)
- Academy Data Privacy** (June 2017 - June 2018)
- Academy Data Retention** (June 2017 - June 2018)
- Academy Data Archiving** (June 2017 - June 2018)
- Academy Data Backup** (June 2017 - June 2018)
- Academy Data Recovery** (June 2017 - June 2018)
- Academy Data Migration** (June 2017 - June 2018)
- Academy Data Integration** (June 2017 - June 2018)
- Academy Data Interoperability** (June 2017 - June 2018)
- Academy Data Portability** (June 2017 - June 2018)
- Academy Data Accessibility** (June 2017 - June 2018)
- Academy Data Usability** (June 2017 - June 2018)
- Academy Data Reliability** (June 2017 - June 2018)
- Academy Data Accuracy** (June 2017 - June 2018)
- Academy Data Completeness** (June 2017 - June 2018)
- Academy Data Consistency** (June 2017 - June 2018)
- Academy Data Validity** (June 2017 - June 2018)
- Academy Data Integrity** (June 2017 - June 2018)
- Academy Data Confidentiality** (June 2017 - June 2018)
- Academy Data Availability** (June 2017 - June 2018)
- Academy Data Security** (June 2017 - June 2018)
- Academy Data Privacy** (June 2017 - June 2018)
- Academy Data Retention** (June 2017 - June 2018)
- Academy Data Archiving** (June 2017 - June 2018)
- Academy Data Backup** (June 2017 - June 2018)
- Academy Data Recovery** (June 2017 - June 2018)
- Academy Data Migration** (June 2017 - June 2018)
- Academy Data Integration** (June 2017 - June 2018)
- Academy Data Interoperability** (June 2017 - June 2018)
- Academy Data Portability** (June 2017 - June 2018)
- Academy Data Accessibility** (June 2017 - June 2018)
- Academy Data Usability** (June 2017 - June 2018)
- Academy Data Reliability** (June 2017 - June 2018)
- Academy Data Accuracy** (June 2017 - June 2018)
- Academy Data Completeness** (June 2017 - June 2018)
- Academy Data Consistency** (June 2017 - June 2018)
- Academy Data Validity** (June 2017 - June 2018)
- Academy Data Integrity** (June 2017 - June 2018)
- Academy Data Confidentiality** (June 2017 - June 2018)
- Academy Data Availability** (June 2017 - June 2018)
- Academy Data Security** (June 2017 - June 2018)
- Academy Data Privacy** (June 2017 - June 2018)
- Academy Data Retention** (June 2017 - June 2018)
- Academy Data Archiving** (June 2017 - June 2018)
- Academy Data Backup** (June 2017 - June 2018)
- Academy Data Recovery** (June 2017 - June 2018)
- Academy Data Migration** (June 2017 - June 2018)
- Academy Data Integration** (June 2017 - June 2018)
- Academy Data Interoperability** (June 2017 - June 2018)
- Academy Data Portability** (June 2017 - June 2018)
- Academy Data Accessibility** (June 2017 - June 2018)
- Academy Data Usability** (June 2017 - June 2018)
- Academy Data Reliability** (June 2017 - June 2018)
- Academy Data Accuracy** (June 2017 - June 2018)
- Academy Data Completeness** (June 2017 - June 2018)
- Academy Data Consistency** (June 2017 - June 2018)
- Academy Data Validity** (June 2017 - June 2018)
- Academy Data Integrity** (June 2017 - June 2018)
- Academy Data Confidentiality** (June 2017 - June 2018)
- Academy Data Availability** (June 2017 - June 2018)
- Academy Data Security** (June 2017 - June 2018)
- Academy Data Privacy** (June 2017 - June 2018)
- Academy Data Retention** (June 2017 - June 2018)
- Academy Data Archiving** (June 2017 - June 2018)
- Academy Data Backup** (June 2017 - June 2018)
-

We will work very closely with NSITSP's current management office, Executive Committee, Committee Chairpersons, vendors, and other key contacts to ensure all required information is transitioned in an efficient manner.

In less than 72 hours of a fully executed Agreement, all communication vehicles and contact information (such as phone, fax, mailing address, etc.) will be updated and in operation.

TRANSITION SCHEDULE

GENERAL/ADMINISTRATIVE

Action/Item	Person/Department Responsible	Estimated Timeframe
Request all items on Bolder Strategies' Request for Association Information form. Such items include:		
<ul style="list-style-type: none"> Financial records and systems Tax returns and other tax documents Membership records and systems Inventory of property and supplies Meeting minutes Bylaws and incorporation papers Current procedures Strategic plan Insurance documentation Native files for all association forms 	Association Manager	Week 1
Review all received documentation	Bolder Strategies Assigned Team	Week 1
Meet with Board to discuss past procedures and management expectations.	Association Manager	Week 1
Conduct internal staff meeting to discuss client expectations and to review key association materials. Educate staff about association, frequently asked questions, phone answering, etc.	Bolder Strategies Assigned Team	Week 1
Assign new phone line for association.	Association Manager	Week 1
Forward mail to new mailing address.	Previous Association Management Company	Week 1
Have calls forwarded to new phone number.	Previous Association Management Company	Week 1
Determine existence and contents of storage items. Have storage items moved to Bolder Strategies' office.	Previous Association Management Company Bolder Strategies Association Manager	Week 1

TRANSITION SCHEDULE

GENERAL/ADMINISTRATIVE

Action/Item	Person/Department Responsible	Estimated Timeframe
Determine status of: <ul style="list-style-type: none"> Membership notification tools Publications Newsletters Directories Current procedures Audio files Other items 	Association Manager	Week 1
Initiate companywide internal time tracking codes	Association Coordinator	Week 1
Initiate postage, copier, phone, and fax codes for client organization.	Association Manager	Week 1
Determine status/need for vendors/contracts: <ul style="list-style-type: none"> Association management system (AMS) Accountant Legal Counsel Web Host Printing Provider Other 	Board of Directors and Association Manager	Weeks 1 - 6
Notify Secretary of State of change in Registered Agent. File for Foreign Entity Status, if applicable.	Association Manager	Week 2
Notify media, allied organizations, members, bank, post office, vendors, and other contacts of change of address.	Bolder Strategies Assigned Management Team	Week 2
Meet with current vendors to review current projects as well as management/communication process.	Association Manager	Week 3
Conduct one-on-one meetings with board members and committee chairs.	Association Manager	Week 3 - 6
Conduct online survey of existing members.	Association Manager	Week 3 - 6

TRANSITION SCHEDULE

FINANCE/ACCOUNTING

Action/Item	Person/Department Responsible	Estimated Timeframe
Obtain the following: <ul style="list-style-type: none"> Federal ID Number(s) Tax exemption determination letter QuickBooks Backup file or online access if QBO Chart of accounts General ledger detail for current fiscal year Current operating budget List of all revenue sources Amortization & depreciation schedules Invoices (paid and payable) Bank & Investment Statements List of Liabilities Aged accounts receivables Prior audited financial reports Prior tax returns Vendor list Lists of all investment accounts and contact information for investment firm 	Accounting Department Representative	Weeks 1 - 2
Determine and evaluate direct pays from checking account(s). Make changes if necessary.	Accounting Department Representative	Week 2
Obtain name and contact information for accounting firm or current accountant.	Accounting Department Representative	Week 2
Review investment strategies.	Association Manager and Accounting Department Representative	Week 2
Obtain all insurance policies. Review insurance carrier information and renewal month.	Accounting Department	Week 2
Notify insurance carriers/agents of new address/management.	Association Manager	Week 2
Determine existence/need for: <ul style="list-style-type: none"> Convention cancellation policy Event insurance Directors and Officers liability insurance General liability policy 	Association Manager	Week 3
Establish bank account. Close existing accounts, if necessary.	Association Manager	Week 3
Transfer or establish merchant account	Accounting Department Representative	Week 3 - 4

TRANSITION SCHEDULE

MEMBERSHIP SERVICES

Action/Item	Person/Department Responsible	Estimated Timeframe
Obtain the following:		
<ul style="list-style-type: none"> • Access to review membership database and association management system • Membership list (electronic) • Board of Directors list and contact information • Committee lists • Media/press lists • Membership application • Membership renewal letters • Membership removal letter • Membership welcome packet • Membership prospect kit 	Membership Manager	Weeks 1 - 2
Develop understanding of membership dues billing method and cycle. Issue any pending membership renewal notices.	Membership Manager	Week 2
Develop understanding of membership campaign schedule.	Membership Manager	Week 3

TRANSITION SCHEDULE

MARKETING & COMMUNICATIONS

Action/Item	Person/Department Responsible	Estimated Timeframe
<p>Determine status of the following:</p> <ul style="list-style-type: none"> • All native files for all logos, association forms, and marketing materials • Pending copy for newsletters/publications • Pending or existing copy for brochures • Pending and existing copy/database for directory • Press/media kit • Rate cards/rates for all advertising • Current advertising contacts • Logins to all social media passcodes • Vendor contacts and contracts for such services as printing, publishing, etc. 	Marketing Manager	Week 2 - 3
Determine communication deadlines and schedules.	Marketing Manager	Week 3
Determine PMS Colors and review branding guide.	Marketing Manager	Week 3
Issue press release about new management relationship.	Marketing Manager	Week 4

TRANSITION SCHEDULE

WEB & TECHNOLOGY

Action/Item	Person/Department Responsible	Estimated Timeframe
Issue all passcodes for all platforms and online accounts.	IT Manager	Weeks 1 - 2
Update website with new address, phone number, and key contacts.	IT Manager	Week 4
Make any required website updates.	IT Manager	Weeks 4 - 6

EVENT MANAGEMENT

Action/Item	Person/Department Responsible	Estimated Timeframe
<p>Receive the following:</p> <ul style="list-style-type: none"> • All event related contracts • Listing of all past events • Past event attendance lists • Exhibitor prospectus • Exhibitor contracts • List of volunteers/roles in meetings and events • List of exhibitors/sponsors • Current meeting checklist and standard operating documents • List of and accounting for current registrations, sponsors, and exhibitors for past and upcoming events 	Event Manager	Weeks 2 - 3

FINANCIAL INVESTMENT

Bolder Strategies is committed to providing the National Society of IT Service Providers with a very high level of support. In turn, Bolder Strategies will be compensated for its services on a flat-fee basis. Our extensive non-profit operation, membership recruitment and retention, and fundraising experience will assist in generating the income necessary to cover the costs associated with the services provided by Bolder Strategies as well as to keep NSITSP operating successfully.

Furthermore, Bolder Strategies is willing to waive the inbound transition fee for NSITSP. We are committed to the organization's success and strongly desire to serve as NSITSP's management partner.

Initial Three-Year Agreement for Ongoing Management Services	
DELIVERABLES	MONTHLY INVESTMENT
<p>The following deliverables will be provided under our comprehensive association management solution:</p> <ul style="list-style-type: none"> • Association Management • Board and Committee Meeting Support • Headquarters Infrastructure • Financial Management and Reporting • Membership Support Services • Publication Support Services • Technology and Website Management • Marketing, Communications & Social Media Management 	<p>\$3,250/month</p>

Bolder Strategies shall be entitled to reimbursement from the National Society of IT Service Providers for all reasonable and necessary operating expenses including the following: travel expenses, third-party software, printing services, phone services, postage, etc. Bolder Strategies will be responsible for all staff-related expenses, office lease, utilities, and office equipment.

Additional services will be presented in a separate proposal, as needed.

This proposal is valid for 60 days from date of issue. We are open to further discussions with NSITSP regarding our financial investment proposals.

CLIENT LIST

Bolder Strategies has extensive experience working with professional societies and trade associations. Since the onset of our company, our client base has been extremely diverse. By servicing client organizations from diverse industries and regions. Bolder Strategies is able to incorporate the lessons it has learned into its best practices, which it then leverages across its client organizations.

The following is a list of clients for which Bolder Strategies has provided comprehensive or function-specific services:

- Association of Deans & Distributors of University Colleges & Undergraduate Studies
- Gamma Sigma Alpha National Honor Society
- National Organization of Minority Architects
- Aviation Distributors and Manufacturers Association
- National Society of Minorities in Hospitality
- Texas Public Purchasing Association
- Association of Professional Christian Women
- Water and Sewer Distributors of America
- American Institute of Hydrology
- Anatomical Pathology Patient Interest Association
- Alpha Omega International Dental Fraternity
- American College of Certified Wound Specialists
- Society of Dermatology Physician Assistants
- DONA International
- National Alliance of Medicare Set-Aside Professionals
- Society for the Advancement of Blood Management
- Alexander Technique International
- Pharmaceutical Management Science Association
- American Association for Emergency Psychiatry
- American Society for Adolescent Psychiatry
- Emergency Department Benchmarking Alliance
- The Tire Society
- Association for Communication Excellence
- National Council on Student Development
- Whirlpool Foundation
- American Association for Women in Community Colleges
- Jack and Jill of America, Inc.
- National Capital Gift Planning Council
- Women in Ophthalmology

CLIENT LIST

Partial list of clients *(continued)*:

- Group Legal Services Association (an affiliate of the American Bar Association)
- PMI Mile Hi Chapter
- American Institute of Architects - Colorado
- National Association of the Remodeling Industry - Front Range Region
- National Association of the Remodeling Industry - Southeast Michigan
- Design Build Institute of America Rocky Mountain Region
- Design Build Institute of America Mid-America Region
- Design Build Institute of America New York Tri-State Metro Region
- Design Build Institute of America Western Pacific Region
- American Society of Professional Estimators - Denver Chapter
- National Association of Professional Organizers - San Francisco Bay Area
- Builder Realty Council International
- Municipal Management Association of Northern California
- Professional Golfers' Association - Colorado Section
- Colorado Black Chamber of Commerce
- Urban League of Metropolitan Denver

CLIENT REFERENCES

Association of Deans and Directors of University Colleges and Undergraduate Studies

Alvin Johnson - Immediate Past President
(936) 261-5916

Aviation Distributors and Manufacturers Association

John Herman - President
(336) 449-5054 ext. 557

Gamma Sigma Alpha

Terence Parker - Board Secretary
(512) 245-5500

"ADMA is proud to have chosen Bolder Strategies as our management company. Our association was in need of new ideas and concepts for growth and member retention.

Bolder Strategies has worked diligently to provide a strategy that will guide us to accomplish both. Upon introducing Bolder Strategies to our membership at our recent annual convention, there was a very noticeable renewed enthusiasm and excitement among our members. We are looking forward to a long and mutually beneficial partnership with Bolder Strategies."

**- John Herman, President
Aviation Distributors and Manufacturers Association**

CONTACT INFORMATION

COMPANY CONTACT

Bolder Strategies, Ltd.
4600 South Syracuse Street, 9th Floor
Denver, CO 80237 USA
(303) 500-5060 HQ office (Denver, CO)
(720) 496-4974 fax
info@bolder-strategies.com
www.bolder-strategies.com

EXECUTIVE CONTACT

Nicole A. Singleton, MBA, MAC, Ph.D. Candidate
Managing Principal
nsingleton@bolder-strategies.com
(303) 500-5060 office
(720) 375-3334 cell





AUTHORIZED SIGNATURE

The undersigned affirms they are duly authorized to submit this proposal for association management services and execute a contract with the NSITSP on behalf of Bolder Strategies.

Nicole A. Singleton

Signature

Managing Principal

Title

Nicole A. Singleton

Printed Name

Bolder Strategies Ltd.

Company Name

(303) 500-5060

Phone Number

(720) 496-4974

Fax Number

nsingleton@bolder-strategies.com

Email Address