

# Association Management Services

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Proposal to  
**Dangerous Goods Trainers Association**



**Prepared for:**

Board of Directors  
Dangerous Goods Trainers Association  
8710 W. Hillsborough Ave. Ste 112  
Tampa, FL 33615

board@dgta.org  
(888) 400-4953

**Statement of Confidentiality**

This proposal and materials contained herein are confidential and proprietary business information of ADG. The proposal may be printed or photocopied for distribution to the Board members ONLY for the express purpose of evaluating the proposal for services. This proposal may not be distributed or shared with other parties outside the organization.

## Table of Contents

I.	Executive Summary	6
II.	Association Development Group, Inc.	6
III.	Scope of Services	10
IV.	Financial Consideration	13
	Appendix A - Awards	14
	Appendix B - Samples of Work	15

July 31, 2020

Board of Directors  
Dangerous Goods Trainers Association  
8710 W. Hillsborough Ave. Ste 112  
Tampa, FL 33615

Dear Directors,

The Association Development Group, Inc. (ADG) is pleased to submit the enclosed proposal for association management services to the Dangerous Goods Trainers Association (DGTA). We hope to forge a partnership with DGTA that builds upon its early successes as a nonprofit trade organization, and DGTA's mission to promote a global standard for dangerous goods professionals and trainers.

ADG is a New York State-based, woman-owned business enterprise (WBE), providing full-service management, communications and event planning exclusively to the nonprofit sector since 1996. The firm has transitioned several organizations from a hybrid team of board members, volunteers, and outsourced services to our management model. ADG offers DGTA a single management team to support daily operations, programming, membership development and communications.

One aspect of ADG that sets us apart from others in our field is our in-house creative, digital and event planning teams that can help eliminate outsourcing and centralize all your operations. ADG's unique approach to nonprofit management includes a compassionate voice and unique approach and perspective based on mission-driven work that is both well managed and effectively communicated.

We look forward to the opportunity to further define how ADG can support your board, continue the strategic growth of DGTA and advance your institutional goals. If you have any questions or need further information, please feel free to contact me directly at any time, 518-421-0105.

We appreciate your consideration; thank you.

Sincerely,

A handwritten signature in black ink that reads "Kathleen A. Van De Loo". The signature is written in a cursive, flowing style.

Kathleen A. Van De Loo  
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[www.adgcommunications.com](http://www.adgcommunications.com)

## I. Executive Summary

Dangerous Goods Trainers Association (DGTA) is a volunteer organization dedicated to enhancing the safe transportation of dangerous goods through effective training and the development of highly competent dangerous goods professionals. Established in 2008, DGTA is a fast-growing professional trade association with a mission to promote a global standard for dangerous goods professionals and trainers, particularly through the promotion and support of training and professional certification. It does so by subscribing to and promoting the highest standards of quality training and its Code of Ethics and Professional Conduct.

DGTA is governed by a volunteer board of directors and currently managed by volunteers. The board has determined that the continued growth and development of the association depends upon demonstrating strong member value and service, work that will go beyond the time commitments and capabilities of volunteers. It seeks an association management company (AMC) to assist with membership records maintenance and billing, bookkeeping and financial management, marketing and communications, leadership development and member communications.

DGTA seeks to have its new management in place by October 1, 2020.

## II. Association Development Group, Inc.

The Association Development Group, Inc. (ADG) is a full service, award-winning management, communications and event-planning firm located in New York State. A certified Women-Owned Business Enterprise (WBE), ADG has been working since 1996 with state, regional, national and international nonprofit charitable foundations, professional medical societies, trade associations and other nonprofit organizations. Our services are scalable to meet needs and fit budgets and include providing solutions for governance, strategy, communications, professional development, finance, operations and advocacy.

ADG has a talented and experienced professional staff of 32 employees and an independent CPA and legal counsel who advise and oversee financial and legal matters. At our core is a commitment to association leaders to develop and maintain strong working relationships, support the vision, mission and goals of the organization, and to exceed expectations in all areas of project management and communications. ADG is ready to provide DGTA a streamlined staff structure that will provide efficiencies and the ability for staff to contribute to a wide range of organizational needs.

We appreciate the opportunity to detail our credentials.

## ADG's Capabilities

### STRATEGIC CONSULTING

A compelling strategy is the starting point for growth. For more than 24 years, ADG has helped develop and grow organizations and advance their objectives by working with association leaders to develop powerful strategic, marketing and operational plans that support organizational goals.

The hardest part of strategic work is implementation. ADG's strategic, marketing and communications plans are written to help monitor and guide progress, keep leaders and staff on track and help organizations live into their strategic plans. Our greatest joy is to work for professional trade associations with missions we believe in and strategic goals we can help advance.

### ORGANIZATIONAL DEVELOPMENT

Growing from the seed of an idea, to a respected member-focused, financially successful, professionally relevant not-for-profit organization requires an understanding of what will work right now, and the vision to build what will be needed in the future.

ADG has a 25-year history of organizational development and strategic planning. We have grown multiple organizations from small volunteer led and managed groups with a "membership list" in Word or Excel into multifaceted, multi-service organizations, some with national and international presence. We've grown training programs into professional certifications programs. We've helped organizations develop a public voice and presence and earn a seat at the table with decision-makers and lawmakers. We've assisted long-established associations in forming subsidiary educational foundations to grow their capabilities and extend opportunities for targeted fund development.

We do these things by helping leaders focus on goal setting and strategic forward movement and by applying two and a half decades of expertise in not-for-profit development and management.

### ASSOCIATION MANAGEMENT

ADG's association management staff provides services in the following areas:

- Overall professional association knowledge in support of mission, leadership, association goals and member needs
- Management, including budgets, financial reports, program and project management, calendars and operations
- Governance, such as board relations, committee structure and support, strategic planning, policy and procedures

- Membership Development/Retention/Service, including development of new member marketing strategies, member engagement and retention programs, member benefit program development and administration, renewal campaigns, and top-notch front-line service to members and potential members
- Education, including program development, professional development training, webinars and continuing education management
- Communications and public relations, including integrated multimedia, copywriting, web maintenance, press conferences and media outreach
- Government relations/advocacy as it relates to supporting the infrastructure necessary to communicate with decision-makers and organize advocacy efforts
- Overall technical proficiency with web-based systems, social media, app development and new integrated media tools to engage and involve volunteers
- Conference and trade show planning, including branding, program development, marketing, abstract management, onsite support and post-event evaluation

Our full-service management includes priority access to our project management professionals, strategic consulting, creative solutions, web and digital marketing, and event and meeting management.

## CREATIVE SOLUTIONS

ADG's creative staff provides full-service design services that supercharge messaging, bring clarity to communications and advance brand and identity. Our work encompasses all traditional and digital marketing, including graphic design, copywriting, print, large format and production sourcing. Please see Appendix B for some samples of our work.

## DIGITAL AND WEB DESIGN

ADG's in-house database and web staff specializes in digital systems. Databases must integrate seamlessly with websites to ensure all the online functions happen in one place, and all necessary data is captured, minimizing duplications of effort and streamlining volunteer management, event planning and financial management in real time.

We understand how to manage a customized, comprehensive digital strategy — expanding web presence and catapulting organizations to the top of search rankings — so brand and mission leverage the power of the internet.

Our team of experts maximizes digital market share by looking beyond the website to provide a sweeping, synergistic strategy that links web design with web development, SEO, social marketing, email marketing, custom databases and paid digital advertising.



## EVENT AND MEETING MANAGEMENT

ADG loves planning successful, worry-free conferences, credentialed education, virtual education and training, special events, meetings and philanthropic programs. Our team has orchestrated thousands of outstanding onsite and web-based experiences for a wide variety of satisfied clients. Meticulous preparation, seamless execution and a positive approach form our recipe for ensuring exceptional, stress-free events.

ADG's event staff enjoy what they do and demonstrate their passion, excitement and creativity in every aspect of the planning process. From committee management, site selection and marketing, to speaker booking and program and schedule development, to onsite registration, fundraising activities and event wrap-up, all your event logistics are expertly managed.

# III. Scope of Available Services

## 1. ASSOCIATION MANAGEMENT

### a. Infrastructure

- i. Build out the professional management team to serve as staff and key points of contact for the organization in governance, membership development and member services, financial management, communications, professional development, and member benefits administration
- ii. Maintain administrative files
- iii. Provide ongoing headquarters and day-to-day operations
- iv. Respond to telephone, email and other correspondence
- v. Provide record retention services, including maintenance of all files, records and other documents relevant to operation.
- vi. Maintain and assist in amending key corporate documents as needed
- vii. Maintain and update membership and contact database
- viii. Maintain weekly work plans and progress reports
- ix. Build and maintain business partner relationships

### b. Governance

- i. Work with leadership to schedule and arrange logistics for regular meetings of the officers, executive committee and standing committees
- ii. Generate and distribute meeting notices in accordance with bylaws and direction of leadership.
- iii. Prepare agendas and reports in consultation with the president or chair for each meeting.
- iv. Participate in officers, executive committee, and standing committee meetings
- v. Record and distribute the minutes of all meetings per bylaws or other policies.

- vi. Identify action items from each meeting to be implemented and provide a detailed list of such items to leadership; coordinate follow up on action items with leadership.
- vii. Coordination of officer and executive committee elections.
- viii. Provide at every meeting of the executive committee, or as requested, reports regarding the conditions and operations of the association, priority project work and the important factors influencing advancement of strategic goals
- ix. Communicate with the president, treasurer, officers and executive committee regarding association law, taxes, and nonprofit accounting and finances.
- x. Provide strategic planning meeting coordination and track implementation of strategies.

c. **Financial**

- i. Maintain financial records in accordance with generally accepted accounting procedures.
- ii. Manage bank accounts with appropriate deposits for checking, savings and certificates of deposit, or other accounts as deemed appropriate by the officers and/or executive committee, to provide for safety, flexibility and interest income.
- iii. Review and approve invoices and prepare and make financial deposits in accordance with policy.
- iv. Prepare checks and distribute payments in accordance with policy.
- v. Prepare and distribute monthly - and as requested - financial reports for designated officers and membership.
- vi. Develop, advise and assist with preparation and approval of annual operating budget.
- vii. Review dues payments and meeting registrations to ensure proper posting and integrity of membership database.

d. **Membership Development and Retention**

- i. Work with the board and membership committee to plan and develop new programs and benefits that enhance member value proposition, strengthen the association's financial position and enhance the reputation of the association.

- ii. Develop and execute member marketing plans, strategies and initiatives.
- iii. Plan and execute an annual membership renewal campaign
- iv. Identify and pursue opportunities to partner with other organizations to mutual advantage.
- v. Continuously review and develop a suite of member benefits designed to provide cost savings and valuable services for members
- vi. Provide membership reports on new members, non-renewals and prospective membership

e. **Brand/Marketing/Communication**

- i. Develop and periodically review annual communication plans
- ii. Develop and produce regular member e-communications, including eNewsletters, member benefit spotlights, member profiles and more
- iii. Develop and expand audiences on appropriate social media
- iv. Develop and place association advertising in relevant media
- v. Manage and maintain the association website
- vi. Write and distribute news articles
- vii. Maintain current information on member benefits
- viii. Develop and maintain a media contact list for distribution of news releases
- ix. Develop and distribute news releases as directed

f. **Education Program Development and Management**

- i. Seek out and develop opportunities to provide members with professional development designed to help them grow and manage their businesses
- ii. Review and recommend potential virtual platforms and speakers/presenters
- iii. Negotiate and execute contracts for relevant webinar/podcast platforms, program venues, and speakers/presenters
- iv. Manage speakers' fees and expense reimbursements

- v. Assist with program development and marketing
- vi. Oversee and manage program registration
- vii. “Onsite” management of all events
- viii. Develop and compile program evaluations

## IV. Financial Considerations

ADG enters into multi-month or multi-year retainer relationships with its clients developed pursuant to a defined scope of services. Retainers are paid in equal monthly installments over the span of the retainer agreement. Without having first determined the extent of the scope of work and the number of members, committees and programs that will make up the annual work plan, we are unable to determine what would be an appropriate retainer, but would estimate an annual retainer of \$40,000 - 48,000.

### **DISBURSEMENTS**

A monthly disbursement invoice would be issued for expenses incurred by ADG on DGTA’s behalf. These are usual costs of doing business and include things such as printing and prepress production services; graphic design and stock photography; travel, lodging and meals; paper and office supplies; postage, express mail and mailing services; photocopying, facsimile/e-fax, telephone service and telephone toll calls; database and website upgrades and service; additional onsite event personnel; website, email and database hosting and any other necessary expenses approved by the president. Expenses would be billed by the third-party vendor to DGTA whenever possible, or otherwise reimbursed to ADG.

ADG seeks to minimize mailing and administrative costs by taking advantage of web-based communications and marketing and use of bulk mailing reduced rates and reduced-rate large-quantity photocopying services whenever available. Disbursements are payable upon receipt of invoice.

# Appendix A – Awards

ADG and its creative team are continually recognized for our contributions to the association industry and our marketing and creative communications work.

A partial list of our awards follows:

- 2020** Silver Albany ADDY Award - NANETS 2019 Symposium Promotion
- 2019** Silver Albany ADDY Award - ADG Logo
- 2019** Silver Albany ADDY Award - ADG Rebrand Campaign
- 2019** Silver Albany ADDY Award - Taylor School Logo Campaign
- 2018** GD USA American Graphic Design Award: ADG Logo
- 2018** GD USA American Graphic Design Award: Women in Insurance & Financial Services AdviseHer newsletter series
- 2016** Ad Club, ADDY Silver Award, Outstanding Advertising Industry Promotion/Direct Marketing: “Associations Matter” Video
- 2016** Empire State Society of Association Executives (ESSAE), Association Excellence Award, Member Recruitment/Retention Program: Insurance Brokers Association of the State of New York
- 2015** Susan Odell Taylor School Leadership Society Award
- 2015** Ad Club, ADDY Silver Award, Outstanding Website Design: The Albany Ad Club
- 2015** Ad Club, ADDY Silver Award, Outstanding Promotion: New York Credit Union Association History Project Banner Series
- 2015** GD USA, American Graphic Design Award: Association Development Group, Inc. Website
- 2015** GD USA, American Graphic Design Award: Loudonville Assisted Living Residence Welcome Home Brochure
- 2015** GD USA, American Graphic Design Award: Loudonville Assisted Living Residence Website
- 2015** GD USA, American Graphic Design Award: Society for Integrative Oncology Logo Design
- 2015** GD USA, American Graphic Design Award: St. Pius X School Website
- 2015** Empire State Society of Association Executives (ESSAE), Outstanding Marketing Campaign: New York Credit Union Association
- 2014** GD USA, American Graphic Design Award: NYS Veterinary Medical Society LEAP! Campaign
- 2014** GD USA, American Graphic Design Award: New York Public Transit Association “Ensuring the Future” Report
- 2014** GD USA, American Graphic Design Award: Hudson Valley Horticultural Services Stationery Package
- 2013** Ad Club, ADDY Finalist: New York Public Transit Association “Distracted Driving” Campaign

# Appendix B: Samples of Work

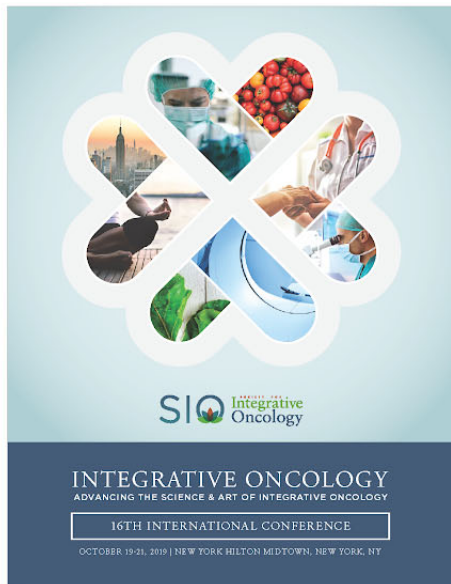




# Society for Integrative Oncology (SIO)



SIO Logo



Conference Program



Website Slider



Sponsorship Prospectus



Vendor Passport



Conference Name Badges

# Northeast Chapter of the American Association of Airline Executives (NEC-AAAE)



**REIMAGINE THE WAY WE FLY**  
2018 NEC/AAAE ANNUAL CONFERENCE

Chapter and Conference Logos

**WOMEN IN Aviation**

**PRESIDENT**  
**MARIA SHERIDAN, A.A.E.**

**CURRENT POSITION**  
Senior Director, Government Affairs & Business Development, Morristown Airport (MMU)

**CAREER HIGHLIGHTS**  
President, NE Chapter AAAE  
Chairperson, Morris County Economic Development Corp  
Secretary, TransOptions, one of eight Transportation Management Associations (TMAs) in NJ that implement strategies and programs to address traffic congestion, economic development, air quality, and livability issues.  
Recognized as one of the "Best Fifty Women in Business" in 2017 by ABBIZ  
ACRP Project 01-14 Pipeline: "Considering and Evaluating Airport Privatization"

**CAREER POSITIONS**  
Comair Aviation Academy  
Operations Manager, MMU  
Senior Director, Government Affairs & Business Development, MMU

Print Collateral



# The North American Neuroendocrine Tumor Society (NANETS)

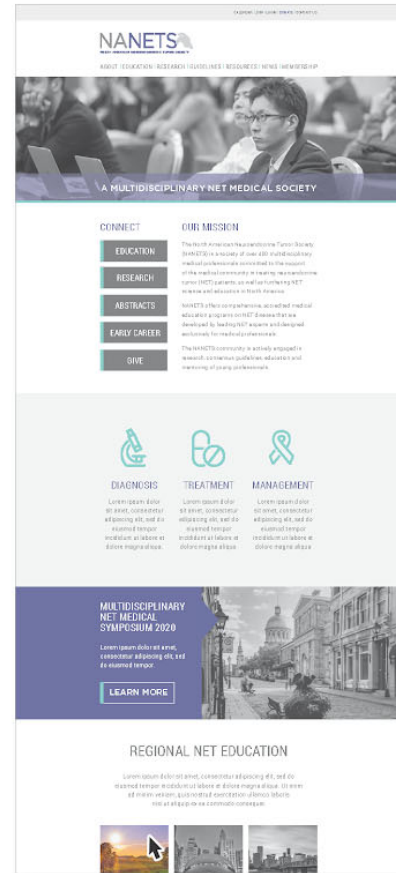


NORTH AMERICAN NEUROENDOCRINE TUMOR SOCIETY

NANETS Logo



NANETmed Icon Set



Website



Exhibitor Prospectus



Certificate of Membership



Regional Training Name Badges

# New York State Public Transit Association (NYPTA)

## NEW YORKERS FOR BETTER PUBLIC TRANSIT

New Yorkers for Better Public Transit Campaign Logo



Campaign Website

**NEW YORKERS FOR BETTER PUBLIC TRANSIT**

**WHO WE ARE**

- New Yorkers for Better Public Transit is a coalition of people from all corners of the state, representing a variety of interests, who want to see greater investment in New York's public transit systems.

**WHY IT MATTERS**

- Public transit is a critical component of any community's infrastructure, is essential for mobility, and is driver of growth in our local economy.
- Transit allows people to access jobs, health care, shopping, education, job training and more.
- Without adequate funding, our state's transit services will shrink, service will decline, and

**WHAT WE ARE TRYING TO DO**

- Our goal is to work together, across political divides in Albany, to secure sufficient increases in public transit over the next five years.
- When it comes to infrastructure, funding for public transit systems has been flat for years.
- The fact is, it's increasingly difficult for transit systems to adopt the latest technologies and new transit modes.
- It has also become a difficult to meet needs of customers who continue to use public transit on a daily basis.
- There has been much talk about the funding of the MTA system, but the transit system deserves no less.

<b>OVER 130</b> TRANSIT SYSTEMS THROUGHOUT NY STATE	<b>NEW YORKERS SERVED BY PUBLIC TRANSIT SAVE 260M HOURS</b> IN TRAVEL TIME	<b>PUBLIC TRANSIT LESSENS OUR DEPENDENCE ON FOREIGN OIL AND SAVES 1.3B GALLONS</b> OF GASOLINE IN NEW YORK STATE ANNUALLY
<b>OVER 9 MILLION</b> PEOPLE IN NY STATE BOARD PUBLIC TRANSPORTATION EACH WEEKDAY	SUSTAINED INVESTMENT IN TRANSIT CAN CREATE <b>\$1K JOBS PER \$1B IN INVESTMENT</b>	NY'S USE OF PUBLIC TRANSIT REDUCES THE CARBON EMISSIONS BY <b>17M TONS</b>
PUBLIC TRANSIT IS A VITAL LINK FOR OVER <b>3 MILLION</b> NEW YORKERS WITH DISABILITIES	<b>\$10K</b> PUBLIC TRANSIT USERS CAN SAVE NEARLY <b>\$10K A YEAR</b> VERSUS DRIVING	NEW YORKERS RIDE PUBLIC TRANSIT MORE THAN <b>3.8 BILLION</b> TIMES ANNUALLY
<b>87%</b> OF PUBLIC TRANSPORTATION TRIPS INVOLVE DIRECT ECONOMIC IMPACT ON THE LOCAL ECONOMY	<b>EVERY \$1</b> IN PUBLIC TRANSIT SPENDING IS <b>\$4 IN ECONOMIC RETURN</b>	PUBLIC TRANSIT HELPS <b>BUSINESS FLOURISH</b>

Infographic



Collateral Materials



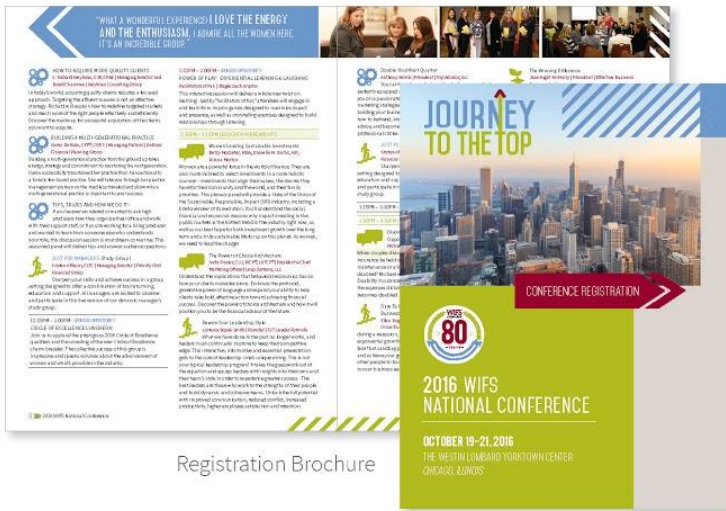
# Women in Insurance and Financial Services (WIFS)



WIFS 2016 Conference Logo



VIP Invitation



Registration Brochure



Drink Tickets



Schedule



Woman of the Year Award Nominee Flyer



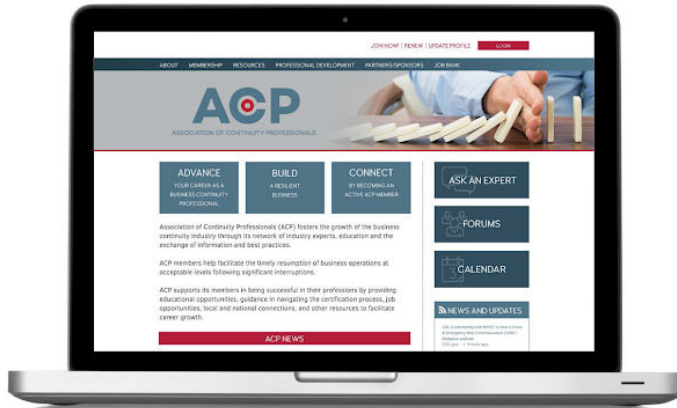
Volunteer Opportunities Flyer

# Association of Continuity Professionals

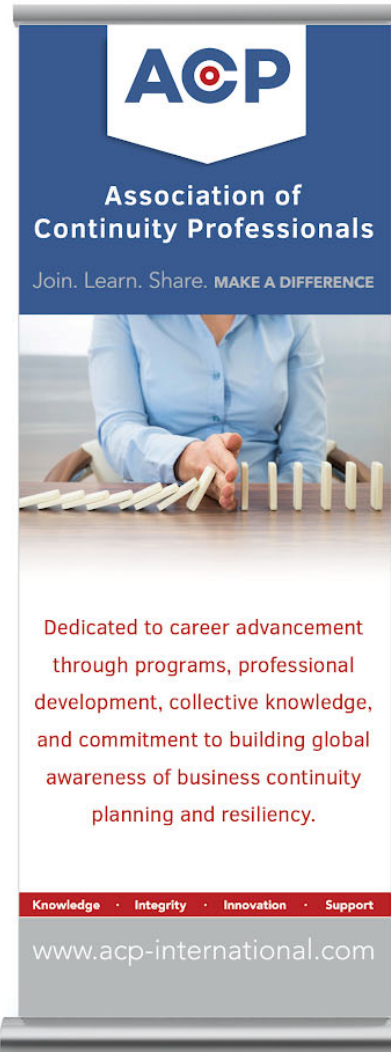


ASSOCIATION OF CONTINUITY PROFESSIONALS

ACP Logo Redesign



Web Design & Development



Retractable Banner



ACP 2017 Conference Program





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