# Association Management Services Proposal

*for*

Dangerous Goods Trainers Association

(DGTA)



# AEG logo_Horiz

# Association Executives Group

7044 South 13th Street

Oak Creek, WI 53154

414-908-4924

www.associationeg.com



Prepared for: Board of Directors

Proposal date: July 29, 2020

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**THANK YOU.**

July 29, 2020

To Whom It May Concern,

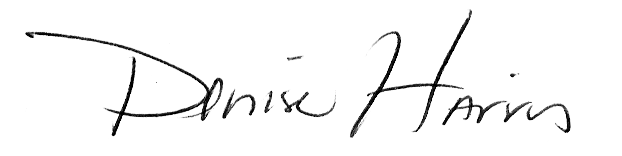
Please accept this bid for the Dangerous Goods Trainers Association (DGTA). The staff of Association Executives Group (AEG) offers your organization dedication, professionalism, and organizational efficiencies. AEG brings more than 30 years of experience in servicing and managing not-for-profit professional and trade associations, foundations and societies.

We are honored to be able to provide a proposal, as DGTA’s size and requirements fit very nicely within the areas that AEG excels. All services we are bidding on are provided by internal staff.

DGTA may wish to increase or reduce the proposed amount of the estimated budget based upon your intimate knowledge of DGTA staff-hour requirements and organizational goals, as we do have the capability to work with you in adjusting departmental services to meet your needs.

Please accept my thanks for this opportunity. We are eager to earn your business through flexible contract negotiations and commitment to keep earning it day after day with top-quality services, and a dedication to outstanding customer service!

Regards,



Denise Harris, CEO

Association Executives Group

Cc: Liz Kutz, CFO, Association Executives Group

**OUR OFFER**

**Fixed monthly retainer: $ 4,980**

Includes all items listed within Addendum A,   
Scope of Services including:

* + Strategic planning
  + Financial management
  + Membership maintenance, development and marketing
  + Communications

Staff support would include the following individuals:

* Membership Specialist
* Marketing Manager
* Senior Graphic Designer
* Controller
* Accountant
* IT Manager

***Note****: The retainer is estimated on 83 hours/month and can be adjusted to fit actual scope and FTE requirements.*

**ABOUT AEG**

AEG, combined with our sister company Harris Marketing Group, has been in business for more than 30 years and our top personnel bring more than 100 years combined experience in nonprofit organizational management and marketing. Our association management firm does not outsource any of our association management, staffing, conference and event management, website and technology development, marketing or membership duties, and we are dedicated to providing high-quality customer service and excellent value.

**The following is a partial list of service capabilities and may be provided to our clients.**

* Efficient operational standards
* Highly talented web and online marketing team
* Membership services
* Chapter management
* Meeting / conference planning
* Educational program management
* Sponsorship, exhibitor and advertising management
* Product and service development
* Accounting and financial services
* Award-winning creative team
* In-house seasoned magazine / publication staff
* Two staff writers / publishing professionals
* Marketing and membership development expertise
* Strategic planning
* 6000 square foot commercial building
* Storage space and daily on-site management

***Please see our full scope of services Attachment B: Service Capabilities starting on page 14.***

**AEG STAFF**

**Executive qualifications and responsibilities**

* All of AEG’s executive directors and association managers are well-versed in association and nonprofit management across a wide spectrum of industries and professions, including international, national and state trade and professional membership organizations, foundations and societies. We have both Certified Association Executives (CAE) and Certified Meeting Planners (CMP) on staff. Our executive directors are skilled in seeing to the day-to-day operations and oversight of the staff team, and to executing policies, programs and initiatives, allowing your leadership to set strategic direction and make policy. Our seasoned professionals will provide insights and recommendations around policy and organizational mission to assist you in your decision-making and collaborate with you in strategic planning, fiscal oversight, and staying in alignment with the organizational mission. Our teams are fully trained in association / non-profit methods and AEG reinvests in training, software upgrades, equipment and facilities to ensure a highly productive and motivating environment.
* Following is a listing of managers and principals who will be assigned to support the DGTA account if selected.
* **DENISE HARRIS - President/CEO – Strategy & Oversight**  
  Denise has more than 30 years of management experience, including organizational management, strategic planning and marketing management for both profit and nonprofit entities. She has served in multiple executive committees, Board-level and Executive Director roles for nonprofits for more than 18 years. She holds a business management degree from Boston College, has won numerous awards and is published nationally and internationally. She currently serves on the ProHealth Care Board, one of the state's largest healthcare networks. Denise supports the clients with any guidance they may need including oversight concerns, strategic planning and organizational growth initiatives.
* **COURTNEY HARRIS - Association Specialist**  
  The Association Specialist will be responsible for membership management, marketing and membership administration. They will also handle a variety of communications and administrative projects. Specialists are a higher level professional that can provide extensive membership management and marketing services.
* **LIZ KUTZ - CFO – Controller, Finance & Accounting**  
  In her accounting career to date, Liz Kutz has proven to be a detail-oriented, client-focused professional with particular talents for troubleshooting and balancing troubled accounts.  She has a bachelor’s degree in accounting from UW-Milwaukee. Liz has worked in both public and private accounting for the past 18 years and has performed cash audit procedures and has managed and maintained payroll and tax records for clients. Liz applies her knowledge and attention to detail to manage our client finances on a day-to-day basis and looks for ways to improve long-term financial health.
* **DEANNA WROBLEWSKI – Senior Accountant, Finance & Accounting**   
  Deanna has over 25 years of experience in the accounting field. She is skilled at solving accounting-related puzzles and enjoys applying her expertise and attention to detail to provide the client with a high level of service. Before joining AEG, Deanna served as a controller for 9 years at a prestigious non-profit country club in the Milwaukee area. When she is not crunching numbers, her interests involve gardening and golf.
* **ROY SMITH - VP of IT – IT Support & Database Management**  
  Roy has over 20 years of IT, website development and back-end, infrastructure programming experience.  His responsibilities include managing client IT projects, the company's IT infrastructure, network engineering and administration, and development of database applications for the web, security administration, member management and event management.
* **KATE FEULING– Conference Sales, Sponsorship & Marketing Manager**

Kate has over seven years of experience in sales, sponsorship, and event management, and over 12 years experience in marketing and advertising.  Kate specializes in applying her expertise and market knowledge to helping clients discover unique marketing opportunities to drive their exposure and membership revenue through detailed promotional plans and marketing strategies. She values providing excellent customer service and is always focused on providing the very best customer care for her clients. Kate graduated from the University of Wisconsin Milwaukee with a Bachelor of Communications degree.

* **ADAM SAARI– Senior Graphic Designer**   
  Adam Saari is our Senior Graphic Designer. He has a Bachelor of Fine Arts from the Illinois Institute of Art in Chicago, IL. During his 12-years of experience, Adam has conceptualized and designed campaigns in a variety of fields including: company branding/rebranding, point of purchase marketing, product photography, website design, illustrational design, multimedia production, and much more.

**CLIENT LIST AND REFERENCES**

**AAMAS** – American Association of Medical Audit Specialists

**AAOP** – American Academy of Orthotists and Prosthetists

**AET** – Association of Educational Therapists

**ARLIS/NA** – Art Libraries Society of North America

**ASATT** –American Society of Anesthesia Technologists and Technicians, Inc.

**CRLA –** College Reading & Learning Association

**CSHEMA** – Campus Safety, Health and Environmental Management Association

**DSA** –Dance Studies Association

**NAO** – National AHEC Organization

**WWOA** – Wisconsin Wastewater Operators’ Association

**Financial References:**

**BMO Harris Bank –** Timothy Klare

VP of Small Business Banking

timothy.klare@bmo.com

262-783-1005

**CPA** – Jenny Tarkowski  
Wegner CPAs

W229 N1433  
Westwood Dr. #105

262-522-7555

**Building Owner** – Ralph Willing

TDW Investments

Cell: 262-613-1148

Work: 252-781-0716

**PROOF OF PERFORMANCE**

**Strategic Growth and Sustainability**

Like any organization, successful growth is carefully planned and consistently executed. AEG works with client organizations to set strategic growth objectives and constantly build member value that lead to increased membership numbers, successful revenue generating programs, valuable vendor partnership programs and more.

*Client Success Story: One of our clients sought to transform their association and take their profession to the next level. AEG facilitated a strategic planning process resulting in the creation of a five-year plan that provides opportunities for expanding awareness of the organization, enhancing membership growth, and leveraging programs and services to build revenue and influence. We also worked with them to develop and implement a comprehensive marketing and rebranding campaign, which includes a new logo design and brand look that will establish the association as forward-thinking, technologically advanced and the premier organization representing the profession.*

**Member Engagement and Value**

The success of any association can be measured by its ability to recruit and retain membership. AEG understands this critical component of organizational effectiveness. We help client organizations develop and implement campaigns to recruit new members and retain existing members, increase renewals and inspire past members to rejoin. Our expertise includes marketing current as well as new and improved member benefits through traditional and digital platforms, and assessing effectiveness of these efforts through analytics, membership numbers and revenues earned.

*Client Success Story: We worked with our client to increase membership from 800 to 3400 over a six-year period. AEG helped to institute a new certification program and establish accredited academic programs and curricula at colleges and universities, increasing regional presence. AEG also developed online CE acquisition and a new sponsorship / exhibitor program, and implemented new certification tests, all of which contributed to the organization’s success.*

**Conference Management, Sponsorship and Sales**

AEG has over 30 years of experience managing association conferences and tradeshows, and standalone educational programs. Our expertise includes annual and regional conferences, live and online educational offerings, site selection and negotiation, sponsorship and exhibitor sales, technical program and faculty management, abstract submission, CE approvals, line registration and onsite management and staffing.

*Client Success Story: One of our client organizations experienced the following during*

*their 2019 conference:*

*Sponsors – increased by 190%*

*Exhibitors – increased by 128%*

*Ads – increased by 300%*

*Total sales – increased by 164%*

*Another of our current clients experienced the following during their 2018 conference:*

*Sponsors – increased by 121%*

*Exhibitors – increased by 150%*

*Ads – increased by 305%*

*Additional items – 121%*

*Total sales – increased by 139%*

*And yet another of our clients experienced the following during their 2017 conference:*

*Sponsors – increased by 140%*

*Exhibitors – increased by 123%*

*Ads – increased by 150%*

*Total sales – increased by 133%*

**Revenue Growth**

Improve productivity, quality output and business processes by utilizing AEG’s experienced team of professionals. Our staff is schooled and experienced in business leadership, marketing, finance, event management and all other areas that are required to provide service excellence to a non-profit organization.

*Client Success Story: We have continued successful conference management and increased conference attendance by 40% since 2012 for one of our largest clients. AEG also increased sponsorship revenue by 80% since 2011 and sold out exhibits four years running.*

**Professional Financial Controls**

AEG’s financial team brings extensive experience, time-tested processes and procedures, and internal control systems. AEG also partners with a CPA partner for annual audits and ongoing guidance for best non-profit management practices.

*Client Success Story: One of our clients came to us with no accounting files, and had $0 in*

*account due to theft from prior AMC. We recreated the entire QuickBooks accounting system based on a printout of prior financials. AEG also recreated the membership database and proceeded to increase its numbers. We researched prior tax documents to draft current year taxes and file them on time and simultaneously planned and executed a conference of over 200 attendees within a few months. Over a three-year period we grew cash reserves 215%.*

**Transition Efficiencies**

Utilizing AEG’s full-service management allows an organization to get fully staffed with experienced professionals, equipped with technology and equipment, and geared up with processes and procedures almost overnight. We handle the day-to-day operations so that you can focus on organizational strategy, setting policy and advancing the association’s mission. Volunteer Board members can rest easy knowing that the organization they provide oversight for is well managed and well serviced.

*Client Success Story: One of our clients came to us with the need to transition quickly. We developed a transition plan and checklist and completed transition in less than 30 days with electronic and paper file integrations. Very quickly, we implemented automation through our proprietary association management website platform.*

**SERVICES CAPABILITIES OVERVIEW**

The following is a partial list and description of our service capability and some may not directly apply to DGTA. A further description of our service capabilities can be found in Attachment C.

* Full-Service Executive Association Management
* On-Site Headquarters Facilities
* Financial Management/Insurance
* Administrative Support
* Board and Committee Support
* Membership Support Services
* Customer Care
* Education, Certification and Accreditation Management
* Chapter Affiliate and Alliance Management
* Product and Service Development
* Information Technology
* Meeting/Conference Support
* Communications and Design
* Marketing and Digital Promotion
* Lobbying Support Services
* Media Support Services

***Specific services for DGTA are outlined in Attachment A on page 13.***

**ATTACHMENT A: SCOPE OF SERVICES**

**Advisory Services** – AEG brings more then 30+ years of providing strategic planning to its client base. Through the client leadership team we will review strategic client goals annually and will develop an action plan to accomplish key goals and utilize ongoing measures to ensure positive outcomes. We have recently worked with two clients to develop a five-year strategic plan to address sustainability and growth, as well as other objectives, and incorporated tactical action plans, staff and committee accountability, and budgetary impacts. We worked with leadership to cascade the plan through leadership approvals, committee charters and volunteer groups. Quarterly reviews and a close working relationship with the Executive Committee ensures ongoing implementation of the plan and that the plan doesn’t lose momentum.

**Financial Management** –Enjoy the benefits of full-time accounting on-site, with executive level oversight on a daily basis. We have over twenty years of experience managing our client’s finances with funds ranging from the thousands to the millions. Our staff will take care of everything DGTA requires from daily bookkeeping practices and monthly statements and reports, to tracking budgets and managing cash flow.

With a full accounting staff, AEG will provide DGTA management information on ongoing financial affairs, specifically:

* Establish and maintain bank accounts
* Allocate expenditures to proper expense categories
* Disburse funds, as authorized, using established procedures
* Prepare and distribute monthly financial reports to the BOARD, with the approval of the Treasurer, in a timely manner
* Manage investments and provide regular investment portfolio reports
* Supervise preparation of tax returns
* Supervise audits
* Work with the Finance Committee to develop an annual budget and provide controls to operate within that budget after approval from the Board.

**Membership Marketing** – AEG will work with DGTA to create a custom membership marketing plan to increase renewals and inspire deactivated members to re-join. We utilize various technology solutions to attract new members and communicate through numerous channels such as social media, email marketing and website content.

**Membership/Database Services** – AEG’s membership marketing and processing department is outstanding in recruiting, retaining and processing members with fully web-integrated member database and well-trained staff. AEG can assist DGTA with the development of a strategic plan to grow membership and increase the value of membership benefits in order to improve overall retention.

**Communication Outreach** – AEG can work with DGTA to spread awareness of your organization through advertising, press releases and media oversight, print and digital marketing campaigns. AEG and prepare and produce public service announcements, brochures, newsletters and other publicity materials.

**Tax Assistance** - AEG contracts outside CPA firms, Wegner CPAs, LLC, and Sitzberger, Hau & Co. S.C., to provide tax services and audit services when requested. Whether you use our tax and audit firms or your own, we stand ready to provide materials as requested, and when suggestions for improvement arise, we enthusiastically implement them.

**ATTACHMENT B: SERVICES CAPABILITIES**

**Overview**

AEG has been in business for more than 30+ years and our primary area of expertise is full-service association management and governance. Our executive directors, along with the owners, take full accountability for the proper management and oversight of your organization and will provide guidance and suggestions for policy, procedure and operational excellence. AEG is fully accredited by AMCI (Association Management Company Institute) and, as an accredited entity, must uphold standards and organizational structures. Our audits for accreditation validate that we ensure that our approach and oversight follow all standards in terms of ethics, training, policy and financial due diligence.

AEG brings more then 20+ years of providing strategic planning to its client base. Through the client leadership team we will review strategic client goals annually and will develop an action plan to accomplish key goals and utilize ongoing measures to ensure positive outcomes. We have recently worked with two clients to develop a 5-year strategic plan to address sustainability and growth, as well as other objectives, and incorporated tactical action plans, staff and committee accountability, and budgetary impacts. We worked with leadership to cascade the plan through leadership approvals, committee charters and volunteer groups. Quarterly reviews and close working relationship with the Executive Committee ensures ongoing implementation of the plan and that the plan doesn’t lose momentum. AEG is happy to share more detail about this expertise and the outcomes of these processes.

AEG brings vision and innovation into our clients’ organization to enhance member benefits and create new revenue streams through program development and value-added resources. We believe that mission and vision-focused strategic planning, careful fiscal analysis and future financial projection, and commitment to tactical implementation to achieve goals and establish new initiatives, are key to growing an organization’s portfolio of products and services.

The following is a partial list and description of our service capability and some may not directly apply to DGTA or may be provided by DGTA staff. Specific services for DGTA are outlined in Attachment A.

**Full-Service Executive Association Management**

AEG’s full-service management will include an experienced staff to support your organization in event management, web and IT, public relations, social media, member relations, vendor relations, accounting, administration and more.

AEG can provide full-service management in all areas that are currently being managed as well as bring extended scope to proactively grow the organization in membership, bring administrative efficiencies and customer service, offer experienced strategic planning and leadership, provide membership public relations guidance, and, if budgeted, public relations program and materials development.

AEG is experienced in developing strategic plans and working with Boards in setting goals and objectives designed to meet or exceed expectations. AEG senior management may meet with the Board and go through our time tested-methods that will result in a collaborative plan featuring growth, member retention and future initiatives.

Effective leadership helps sustain an organization and keeps it competitive. We bring vision and innovation into an organization to create membership demand through program development and value-added resources. Our leadership team has served in senior management roles and steered organizations in their quest for success for over three decades. AEG can, if needed, work with leaders in custom designing a management plan that will meet the goals of the organization.

Here are some of the ways that AEG works internally to maximize client contract efficiencies.

* Assign clear areas of accountability between team members to avoid duplication of work and improve productivity
* Ongoing policy to assign any hours associated with staff learning or duplicative work from errors to AEG overhead
* Monthly client team meetings with all team members to facilitate internal communication efficiencies, further streamline assigned tasks and deadlines, and address questions and obstacles in a more efficient manner
* Process and procedure development for all functions
* Utilization of Outlook task for team member work assignments
* Monthly manager’s meeting to share best practices among managers and clients
* Restructuring of the IT department 1.5 years ago to include a web designer, web publisher, front end developer, back end developer and internal database programmer. This has eliminated our backlog and made project management more predictable and deliver on-time production
* Implementation of a new website backend product that provides more robust reporting for association management functions, seamless integration of payments into finance and integration of membership database functionality

**Headquarters Facilities**

AEG is fully accredited through the AMC Institute. Our company resides in a 6,000 square foot commercial building just off of 1-43 South on Rawson Avenue in Oak Creek, Wisconsin. AEG has both onsite storage for day-to-day working materials, as well as offsite, environmentally controlled archival storage for items such as financial records, publications and other sensitive materials. Electronic storage will be provided at no additional charge. Our boardroom is available for meetings that you may wish to hold on the premises.

Our general office hours are 8:00 AM to 4:30 PM, Monday through Friday, Central Time. Our technical staff is on call 24 hours, 365 days a year for computing/networking/internet issues. In addition, the company President, Vice President of Information Technology, Controller and your Association Manager/Executive Director are also on call evenings and weekends to help ensure outstanding client service. AEG will provide you with dedicated telephone services with the following number, (414) 908-xxxx.

AEG’s voice mail, fax and internet servers and systems are online 24 hours per day, every day of the year. Email addresses will be set up for each individual working on your account, and, in addition, an info@XXXXX.org will be routed to the assigned association manager/executive director. Additional email addresses are available to Board members or designated individuals within the organization.

AEG can provide the filing and storing of all conference and Board documents and financial reports for the current and previous seven years and current inventory as needed (e.g. conference materials—such as LCD projectors, computer speakers, easels, and walkie talkies—in addition to table drapes, brochures, print publications, and other Store items, etc).

**Financial Management/Insurance**

AEG’s administrative/financial department has a long history of providing quality services to our clients. Cash deposits are always double-balanced and auditable, and our financial reports are always on time and accurate. We will work with the Treasurer in establishing annual budgets and provide customized reports as requested. This department also ensures that all outside contracts, including any insurance, are up to date and the best rates are made available.

AEG also contracts outside CPA firms, Wegner CPAs, LLC, and Sitzberger, Hau & Co. S.C., to provide tax services and audit services when requested. Whether you use our tax and audit firms or your own, we stand ready to provide materials as requested, and when suggestions for improvement arise, we enthusiastically implement them.

Our accounting team utilizes QuickBooks Pro accounting software, which is multi-user friendly, allowing for simultaneous access. We have seven-year archives for tax purposes and are well versed in FASB/GAAP (Federal Accounting Standards Board / Generally Accepted Accounting Principles).

Additionally, AEG works with our/your CPA firm to submit tax forms each year to appropriate government authorities. We are fully bonded, and carry errors and omissions liability insurance. We are AMC-Institute/ANSI and Better Business Bureau accredited. Services include: funds management, sub-contract origination and management, credit card/authorize.net account origination and management, phone, fax and postal mailing handling, billing, collections, payables, ledger preparation, financial investment assistance and management reporting to the Board of Directors and appropriate committees.

We will use all Generally Accepted Accounting Principles in maintaining financial records and we have the ability to manage transactions in multiple currencies. All invoices presented for payment will require the approval of the Treasurer or President. Financial reports will be made available monthly and in the format that is acceptable to the Treasurer. Your Association Manager/Executive Director, will prepare annual and conference budgets each year and report on these budgets monthly. AEG will assist in annual tax preparations and/or audits by an independent accounting firm, file all necessary reports with appropriate government agencies, keep any insurance policies current and any other administrative task asked by the Board required to assure compliance with the bylaws and any regulations pertaining to the corporate status. All credit card transactions will be handled using authorize.net, or the credit card processor of your choice, always being PCI compliant.

**Administrative**

Our onsite administrative team will assist your association in the daily administrative tasks to help your association run effectively and efficiently. We provide the common administrative tasks such as database management and membership management, assisting members in profile updates and questions that may arise. We will maintain updated lists of committees, members, special interest groups, editorial review boards, and e-mail groups.

We also provide standard document services such as photocopying, printing, and faxing services, helping your association communicate with members and institutions as necessary. AEG will manage postal and email mailings to contacts as directed. Postal costs for major mailings will be prepaid. We may also provide mailing lists and/or labels to Board and Committee Chairs. Mailing lists provided will not be purchased outside the scope of work.

Your organization will have a dedicated storage space within our office that will be utilized to maintain books and publications, awards, merchandise and other physical items your association needs. We can also assist processing orders for your physical items and printed and digital publications.

**Board and Committee Support**

AEG’s association support team process all requests from the Board of Directors, as needed, including telephone and email communications within the ordinary scope of management. You will find that under our oversight and support, your association will run smoothly and efficiently.

AEG will support all committees as needed, assigning appropriate staff to attend meetings, manage virtual and WebEx meetings, facilitate discussions, prepare documents and provide minutes. Travel and time may be billed separately. A current listing of all committees will be maintained and published on the website.

Meetings are scheduled, directors notified, agenda materials distributed, minutes taken and transcribed (if appropriate), and the meeting costs are kept to a minimum. This includes working with the Director or Board to achieve strategic plan goals and other tactical issues.

We can arrange for any conference lines, meeting rooms, food and beverage, audiovisual needs and hotel accommodations. We can also set up any Board and/or Executive Committee conference calls.

**Membership Support Services**

AEG’s membership marketing and processing department is outstanding in recruiting, retaining and processing members with our fully web-integrated member database and well-trained staff. AEG can assist with the development of a strategic plan to grow membership and increase the value of membership benefits in order to improve overall retention.

Tracking recruitment sources and retention statistics through our web-based survey software will get the answers that your management needs to understand member satisfaction.

**Customer Care**

AEG has skilled problem solvers who are enthusiastic individuals that can listen to the member and their needs to offer unique and innovative solutions to each inquiry. Their primary role is to have a strong command of the organization’s customer service policies and organizational knowledge that can be critical for offering quick and accurate assistance to the members.

Our Customer Care department hours are 8:00 AM to 4:30 PM Monday through Friday, Central Time. All telephone calls will be answered with a greeting customized to your organization. The calls will be transferred to the appropriate department for assistance. AEG’s customer care department processes member questions and requests via phone, email, and mail. Our staff answers questions to the best of their knowledge and forward requests to the appropriate department for resolution.

**Education, Certification and Accreditation Management**

If applicable, AEG’s education and certification department is highly experienced in developing, expanding and managing certification, educational, and accreditation programs. Our team can implement what is needed to develop and manage webinars, grow certification sustainability and organizational accreditation, as well as, process requests and troubleshoot. Also, our fully-integrated technology and databases can be leveraged to automate certifications.

AEG can process documents to check for accuracy and compliance within your organization’s certification standards. After our office receives submissions, they are individually reviewed and entered into your member database so that members can view their credits within their online member profile.

In addition to entering credits into our member databases, we may also create and process printed certificates for members. We are available during regular business hours to answer questions from members and committees. Our staff is dedicated to help your members receive, maintain, and renew their certifications. AEG may also work with you to develop custom online automation for education, testing, certificates, credits management, review and approval processes.

**Chapter Affiliate and Alliance Management**

AEG is fully equipped with the capabilities and technical knowhow to help your organization maintain chapters and alliances. We can bring the full administrative services that we offer your organization to your chapters that can be determined within your organization’s goals, scope of work, and budget.

We offer chapter websites that can serve as a central hub of information for chapter members, process online registrations for chapter events and meetings, and track chapter membership. AEG may maintain a directory of your chapters on your organization’s website. We may also create a sub-domain which will allow your chapters to have a dedicated email address.

Communication is important for chapter members, so AEG can research and suggest various tools, such as Listserv options, to help keep your chapter members connected and informed of chapter events, relevant news, and additional information.

We may also work with your organization to process chapter requests for the development of new chapters, as well as review changes and updates to maintain compliance and accuracy within your organization’s bylaws and goals.

**Information Technology**For additional fees, AEG offers comprehensive web design, database management and security solutions. We have a talented on-site staff with extensive experience in creating and designing websites that intrigue members, suppliers and influencers; help to streamline member communications; manage events and member programs; provide centralized data requisitions and promote to membership prospects. We believe that a strongly designed website is a critical piece in any successful organizational communications strategy, offering a central hub for information sharing, education, easy-to-access documentation and information.

Features include but are not limited to:

* “Find a” functionality used for various industries and member types
* Automated webinar and education management
* Certification document uploads and reviewers automation
* Conference management
* Surveys
* Intranets and Board Websites

Our team of professionals provides technology knowhow that ensures organizational infrastructure 24 hours a day, 7 days a week. We will troubleshoot website and email systems when errors occur to get problems resolved as soon as possible within reasonable and customary issues.

AEG can provide technology and strategy recommendations on software systems. If hosting your site, we will provide computer access and physical office and datacenter security with complete backups nightly and maintain this information off-site for use in an unplanned event.

Meeting support is another technology service that AEG provides. We can provide the technical support and software for online regular Board meetings, online special meetings, online committee meetings, and online on-site conference meetings. We may manage webcast content providers, oversee the schedule and content and run conference calls. We can provide a Board-only intranet where appropriately authorized Board members may access restricted records.

AEG provides web publishing services to maintain and update content on client websites. AEG will also work with the Board of Directors in identifying new technology that will assist in daily business and improving access for members.

**Meeting/Conference Support**

AEG’s association management staff is experienced in facilitation of local, regional, national, and international conferences of many sizes, from small to large (well over 12,000). We are well-versed in site selection, advertising and public relations, abstract acquisition, printed materials, awards, hotel management and contract negotiation, audio-visual acquisition, exhibition and exposition vendor booth sales and show management, tours, budget development and financial management, registration and CEU processing, food and event management and student issues. All VIP travel arrangements will be handled by the assigned Association Manager/Executive Director. A full accounting of each conference may be compiled and delivered to the Conference Chair and the Board of Directors.

Your assigned Association Manager/Executive Director will manage and/or work in partnership with leadership to organize and manage annual conferences and events. AEG will work with the Board of Directors in site selection and inspection, negotiate hotel contracts and with subcontractors, such as audiovisual, overflow hotels, services for the hearing impaired, handicap challenges, and any social events.

Working in collaboration with the AEG graphics team and sponsorship departments, we can develop event branding, marketing and promotion, all conference signage, printed programs, sponsorship creative, exhibitor materials, room sets, layouts and final programs.

The AEG marketing, sponsorship and graphics departments can develop and publish a conference prospectus to solicit exhibitors, sponsors and vendors, and an AEG representative will set up and monitor the exhibit area at the conference site. AEG will provide the necessary representatives in order to handle onsite registrations, exhibitor issues, badge and special event tickets distribution, maintain the conference message board, manage and coordinate volunteers and assist the Program Chair and committee throughout the conference.

Our technology solutions for conferences are vast. We may create the conference website for your association, conference mobile app, and our fully-automated, online abstract submission system, which manages up to 800 submissions, 450 presentations and conflict-free room scheduling. (Additional cost may be required for development or hosting).

**Communications and Design**

Our in-house writing and award-winning design staff has experience in the nonprofit industry, public relations agencies and corporate marketing. In addition, our communications department staff includes project planning, writing, proof reading, editorial, graphic arts and sponsorship/advertising sales professionals who produce and publish print and/or web based magazines, newsletters, hardcover books, conference guides and brochures.

E-blasts may be provided each month and will help to provide on-going and regular communications with members and prospects, used to announce programs and events, promote membership, and introduce educational topics and materials.

Website content may be provided and updated by our team including new copy, imagery, database updates, documents, event information and any other required updates.

We also offer our clients a quick and easy way to share marketing and informational materials with members through an online print-on-demand ordering system. Members are able to purchase printed documentation as needed and in their required quantities and time frames. This can bring great member value to an organization – providing easy access and revenue generation.

**Marketing and Digital Promotion**

Through AEG ’s sister agency, Harris Marketing Group, we are able to provide more than 30 years of experience in creating and executing full-service marketing programs, including digital membership drives and organizational awareness campaigns, digital advertising, email marketing, and pay-per-click campaigns, organic and paid search, direct mail, logo and brand development, search engine optimization and keyword promotion, social media management, including paid posts, content development and promotion, and more.

AEG manages advertising, social media, websites, communication materials and public relations services. We may manage your already-existing social media accounts, or provide information and guidance on which channels are most effective for your association budget and needs.

Our marketing team will be able to not only provide data metrics, but also make recommendations for improvement based on their analysis of that data. Data reports can include Google Analytics, email engagement reports, social media analytics and any digital marketing reporting and conversion rates.

**Lobbying Support Services**

Non-profits often require government support or legislative attention. We have the experience and partners to address your advocacy concerns and needs. Local or federal, we can assist your lobbying professional in managing the process, or provide the materials and “grass roots” efforts to get the word out.

We can assist with gathering information and research to support your position and lobbying efforts. AEG may develop literature and communications materials for policy and positioning for advocacy purposes such as brochures, broadcast emails, flyers, press releases and more. We can then arrange for presentations before agencies and elected officials and attend/coordinate meetings with elected officials to communicate a position and develop support.

Relying on our marketing and lobbying support services, AEG can provide grassroots marketing support such as telephone and email campaigns, outbound public relations support, and educational eblasts on positioning initiatives for legislators. We also bring experience with developing training and onsite event support of “Hill Day” and legislative visits.

**Media Support Services**

Association Executives Group, in combination with Harris Marketing Group, has over 30 years of experience in marketing and media production services. Our staff is knowledgeable in video production, photography, mobile app design and more.

We can partner with you to research the best new media platforms to distribute your organization’s message in the most cost effective and relevant method for your audience. Our media creation services can be tailored to your unique budget and needs and will position your organization as a leader in your industry.

**ATTACHMENT C – TECHNOLOGY OVERVIEW**

**Programming Languages**

HTML5, CSS3, PHP, ASP.NET, jQuery

**Web Design**

Standard Static Web Site Design & Development

Dynamic Web Site Design & Development

Responsive Web Site Design & Development

eCommerce Web Site Design & Development

SEO Friendly Web Site Design & Development

**Content Management Systems**

WordPress, Joomla, Drupal

**Association Management System Database**

**CiviCRM membership and event management system**

**eCommerce Platforms**

WooCommerce, ZenCart

**Payment Gateway Integration**

Standard Payment Integration, Authorize.Net, PayPal

**Other**

Adobe Flash Animations

Adobe Flash eBooks

HTML5 eBooks

HTML News Letter Design & Development

WordPress Plugin Development

**Web Servers**

IIS Web Server Setup

IIS FTP Server Setup

Apache Web Server Setup

**Windows-Based Software Development**

**Software Development Languages**

C#.Net, VB.net, Java

**Databases**

MS SQL, MY SQL, Oracle, Membership Database

**ATTACHMENT D – SAMPLE TRANSITION PLAN**

Below is a sample chart of events that will take place during the transition and the estimated time frame based on a projected start date to be determined to meet DGTA’s schedule. Costs of transition are not to exceed a month’s retainer. *(This date shall become the transition “T” date below).*

|  |  |
| --- | --- |
| Activity | Date transferred to AEG |
| Membership |  |
| Skeleton of Database | T – 60 days  -This allows our staff to replicate the database in-house and start to create electronic and paper membership forms. |
| Website and Database | T – 60 days  - Websites and other content may be moved to AEG starting T – 60 days. On T – 2 days a DNS change would be processed officially moving all web-based content to AEG. Additionally, effective that same day members would be able to enroll, renew, change profile information, look up content and access any other online function made available online. |
| Set up phone numbers and access/contact information | T – 30 days  -Set up phone, fax and email so it is fully operational by Transition Date. |
| Change of address submitted | T – 15 days |
| Cut off membership processing | T – 2 days  -Setting a hard date allows us to transfer the current data and ensures no member gets left behind. Membership database will be fully functional by Transition Date. At the end of the last workday before Transition Date, the prior company/staff member will email, ftp or burn a CD and overnight ship it to AEG. Upon receipt of the closed database, it will be loaded to the new AEG database (a process that usually takes about two hours). The database is then put online and is usable by the in-house staff, Board of Directors, and the members. |
| Financial | This date is really your choice; this is the area where most transitions run into problems. T - 60 a chart of accounts will be sent to AEG so we can create it in our system and we can be operating by Transition Date. Like membership, a drop-dead date must be established and a final audit completed. This ensures the validity of the data being transferred. |
| Conferences, Events, Programs and Services | This happens throughout the process, as early as possible in the transition period. Staff responsibilities for specific conferences, events, programs and services will be assigned early in the transition. Assigned staff will coordinate and meet with current association committees and staff to begin the process of transfer of documents, checklists, timelines, online platforms, etc. Transition of conferences, events, programs and services will be closely coordinated with transfer of website, database and financial information. |
| Historical Documentation | This happens throughout the process, as early as possible throughout the process we will want all association documents sent to our offices. We will then evaluate and determine what information needs to be stored off-site and what information needs to be stored on-site.  Also throughout the month of T - 30 we will get acclimated to the processes and procedures of your association in order to prepare AEG for a complete transition. This information will be obtained through the evaluation of the historical documents, communication with the board and working with the current firm (if possible). |