

# AVALON

association management

Response to



## Association Management Services RFP

**Submitted by:**

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**Member of:**



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July 31, 2020

Dear DGTA Board of Directors,

In response to the DGTA RFP, Avalon Association Management (AAM) is pleased to offer our 20+ years of management services to your organization.

AAM staff can immediately support DGTA with financial management, marketing/communications, and membership management.

Thank you for your consideration and we look forward to the opportunity to work together soon.

Warm regards,



Ilyse Shapiro, CMP, MBA  
Principal, Avalon Association Management



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## **Executive Summary: About Avalon Association Management (AAM):**

AAM exists to provide full-management support to organizations in their effort to advance their primary purpose of membership growth. For more than 20 years, we have been providing leadership, communications, marketing and association management services to leading for- and not-for-profit organizations. Whether it's assisting your volunteers on a strategic plan, developing cohesive membership communications, or overseeing your organization's database and administrative services, AAM will make your job easier. We specialize in executive management, event administration, membership services, marketing and communications, and database management, as well as administrative and financial functions. AAM works diligently to partner with our clients to make their organizations thrive. We do this through a variety of functions including:

- New membership acquisition
- Long-term membership retention
- Member benefit enhancement
- Dues management
- Membership monetization
- Quality service

## **Our Approach:**

Our partnership will start with an initial assessment of strategic goals, issues, challenges and timelines. This assessment will ensure that we are totally clear on any immediate challenges, as well as DGTA's future goals. Together, we will develop an operating plan and then, with the Board's agreement, deliver on these recommended services and tactics. Along the way, we will provide the Board with feedback and evaluation. We will deliver on DGTA's goals, objectives and strategies enumerated in your Operational Plan. We will focus on three overall functional support areas: strategic, tactical and operational. Each of these functions is essential to our success working together in the future. Immediate tasks include:

- Develop a timeline of Board needs and when each will be fulfilled by AAM.
- Work needs into existing calendar of events.
- Ensure that all members meet association specifications.
- Ensure that leadership is doing what they are supposed to do and not overstepping boundaries.
- Make sure that Strategic Plan is up to date and is being followed.
- Work with finance committee on bringing over QuickBooks.
- Ensuring that all financial numbers equate.
- Work on current financial plan, as well as next year's financial proposal.
- Develop meetings with proper in-house members.
- Formalize committee structures.
- Formalize eligibility criteria and financial tracking of funds provided/awarded.

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## AAM Clients:

- Association Manager, Philadelphia Academy of Surgeons (250 members)
- Executive Director, PA Association of Fire Sprinkler Installers (280 members)
- Association Administrator, Philadelphia Society for Coating Technology. Inc. (125 members)
- Association Administrator, PA Region, Automatic Fire Alarm Association (150 members)
- Communications Consultant, Healthcare Leadership Network of the Delaware Valley (1,200 members)
- Events Supervisor, Delaware Valley HIMSS (1,800 members)
- Communications Consultant, Healthcare Leadership Network of New York (1,700 members)
- Chapter Management Professional, SEPA SHRM (495 members)
- Executive Director, American Association of Matrimonial Lawyers, NJ Chapter (80 members)
- Communications Administrator, International Society of Hypnosis (700 members)

## Staff Bios:



***Ilyse Shapiro, MBA, CMP: Account Executive/Executive Director***

For more than 20 years, Ilyse Shapiro, founder of Avalon Association Management, has been providing communications, marketing and association management services to some of our area's leading for- and not-for-profit organizations. Whether it's assisting your volunteers with a special event, developing a cohesive membership communications plan, or overseeing your organization's database and administrative services, Ilyse and her team of experts are here to make your job easier.



***Ryan Rosenbaum, MBA: Membership Manager***

Ryan Rosenbaum has spent the last 13 years of his career working for member management organizations 501C(6). He had the pleasure of serving organizations ranging from Community Centers, REALTORS®, International Accountants and Remodelers. Ryan's professional roles include Media Relations, Marketing, Educational Development, Membership Coordination, Operations, Conferences, Strategic Planning and Governance.



***Karin Hannon: Administrative Assistant***

Karin Hannon has been on the AAM team as its Administrative Assistant since 2018. Before 2018, Karin was a stay at home mom, now making her way back into the workforce.



***Ronna Bonds: Special Events Manager***

For the past 20 years, Ronna has been the director of sales and marketing for five large hotel chains in the Philadelphia area.

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## Fees & Costs:

	<u>Per Year</u>	<u>Per Hour</u>
Ilyse Shapiro, AE/ED	\$ 6,000	\$50/hour (10 hours /month)

- AAM adds 5% mark-up on all outsourced services such printing, supply sourcing, et al with vendors not noted above
- \$0.58 per mile driving fee
- \$0.30 color copying per sheet/\$0.09 black and white copying per sheet
- Onboarding fee of \$50.00 per hour which includes transfer of any computer files, Quickbooks, membership, etc.

\* The prices shown are open to negotiation.

## Outsourced Services (Additional Fee Required)

- Web site provider (Digital Media)
- Legal counsel (including any Sunshine Law help)
- Software licenses: Go to Meeting software, Email License (Constant Contact or other); CRM system (MemberClicks, YM or other); Public Relations distribution software (Marketwire or other); Membership Directory software; Teleconference Line (open Voice or other); Linked In, Facebook, Twitter; Survey Monkey; Drop Box
- Insurance (D and O)
- Promotional materials vendor
- Bookkeeper and/or CPA
- Accounting software (QuickBooks or other)
- Printers/Copiers (supplies, paper, Ink)
- Fees for USPS, Fedex, UPS
- Travel, transportation, accommodations, meals, and related expenses
- Facility chargeback

## Additional Costs for Transition:

- Meet with each Board of Directors member to go over each area's specific needs and desires, as well as what has not been working. (Fly, drive or phone, hotel costs, meals, if applicable.)
- Face-to-face meeting with past AMC to receive materials and information needed. (Fly, drive or phone, hotel, meals, if applicable.)
- Onboarding fee of \$50.00 per hour which includes transfer of any computer files, QuickBooks, membership, etc.
- UPS boxes of materials to PA office (UPS fees).

## References:

- Allison P. Wilson-Maher, MBA, FACHE, HLNDV, [allison.wilson-maher@penmedicine.upenn.edu](mailto:allison.wilson-maher@penmedicine.upenn.edu)  
Communications Consultant, Healthcare Leadership Network of the Delaware Valley  
(1,200 members)
- Daniel Morrin Jr., SET | NICET Certified, Level IV #115035, [dan@neccosecurity.com](mailto:dan@neccosecurity.com),  
Association Administrator, PA Region, Automatic Fire Alarm Association  
(150 members)
- Ford Myers, President, Career Potential, [frmyers@comcast.net](mailto:frmyers@comcast.net)

## Scope of Services:

### ➤ Governance

- Craft an annual strategic plan which identifies high-level goals, major work streams, and measures targets for key performance indicators.
- Seek involvement of the Board of Directors regarding policy decisions, fundraising and visibility of your organization.
- Oversee the organization's Board and committee meetings.
- Define marketing and branding strategy.
- Serve as your organization's spokesperson to constituents, media and the general public.
- Provide strategic planning and implementation.
- Supervise and collaborate with organization's staff.
- Support membership by increasing value proposition.

### ➤ Membership Support Services

- Maintain a single comprehensive database for all members, update database, process payments, respond to inquiries, and send information to new members.
- Membership renewals occur annually on a "rolling" monthly. Send out electronic reminders prior to dropping from the active membership list.
- Maintain the membership directory database on the website.
- Prepare mailing information as needed.
- Host the web site on the designated server and update as needed upon request.
- Proofread and finalize the Newsletter and send electronically to members.
- Assist in development and implementation of membership drives instituted by the Membership Committee.

## ➤ **Board Service Responsibilities**

- Provide advice and information, prepare meeting materials prior to meeting
- Take and distribute minutes
- Provide financial reports to treasurer for review prior to dissemination to the Board.
- Arrange for location, food, beverages, and audio-visual supplies for face-to-face meetings
- Arrange airfare/travel, hotel and meeting registrations for officers and executive director.
- Conduct surveys of membership at the request of committee chairs, officers and/or the ED.
- Prepare and send out ballot for officers.
- Provide financial reports to treasurer for review prior to dissemination to the Board.
- Arrange for location, food, beverages, and audio-visual supplies for face-to-face meetings
- Arrange airfare/travel, hotel and meeting registrations for officers and executive director.
- Conduct surveys of membership at the request of committee chairs, officers and/or the ED.
- Prepare and send out ballot for officers.

## ➤ **Financial Performance and Viability**

- Plan and operate annual budget.
- Establish and maintain relationships with organizations that will enhance your mission.
- Income and expense responsibility including: recording and depositing income from member dues, conference registration, vendor displays, web site advertising
- Pay all bills with approval of the treasurer.
- Prepare monthly financial reports and consolidated balance statements for the treasurer and Board.
- Assist the treasurer with budget preparation and tracking to maintain an accurate accounting of income and expenses.
- Monitor and report on investments.
- Process credit card receipts.
- Arrange for annual audit and tax filings. Provide legal advice and have access to legal services as requested and necessary (fees paid by your organization). Employ and maintain budget software that can be accessed easily by the Treasurer and Executive Director (QuickBooks).

## • **Association Management and Storage Facilities**

- Provide a full-time office for the receipt of telephone calls, occasional mail, and processing of business.
- Provide phone coverage during regular business hours five days a week.
- Provide a fax line for the organization.
- Provide one general email address for business, plus individual addresses for board members and committee chairs.
- Storage for financial and archival records, legal documents, membership information, and back publications maintaining an index of stored materials and electronic archiving of old documents, and all current and future documents.
- Interface and collaborate with the executive director (if appropriate) to ensure efficient work flow and task management.



## ➤ **Communications/Social Media**

- Facilitate communications with members.
- Access all available media to promote events and activities, including community calendars and local/regional/national media.
- Web site management including database management, e-commerce marketing, hosting, updating, maintenance, and content management.
- Build and nurture your brand.
- Provide media and community relations.
- Write and distribute press releases to appropriate media.
- Serve as spokesperson and/or representative of organization as appropriate.
- Design off- and on-line materials, including newsletters, brochures, logos, graphics, Web sites, ads, signage and other marketing materials.
- Provide editorial services including copywriting and proofreading.
- Respond to inquiries about association's programs and services
- Develop and execute a marketing and communications plan
- Write, design and create fundraising materials

## ➤ **Insurance**

- Secure and maintain Board of Directors Insurance including director and officer errors and omissions.

## **Proposed Transition Schedule:**

- 10/1/20: Contract awarded
- 10/15/20: Meet with Board Chair to review specific needs; meet with previous AMC/employee(s); receive stored items; have face-to-face meeting with previous AMC
- 10/30/20: Develop events calendar which includes Board/committee needs, as well as reports for each upcoming event; UPS boxes of materials to PA office
- 10/31/20: Fully assume hand-off.