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PRESENTED TO:



PROPOSAL ASSOCIATION MANAGEMENT SERVICES



PREPARED FOR:
Dangerous Goods
Trainers Association

PROPOSAL ISSUED:
07.31.2020

PROPOSAL VALID TO:
09.30.2020

FIRST AND FOREMOST

THANK YOU

FOR CONSIDERING US!

Since 1997, cmcglobal has worked to exceed clients' meeting and event objectives by providing superior consulting and logistical project management services.

cmcglobal provides association management services to a wide variety of member based organizations and has a diverse portfolio of clients where conference success is their strategic focus.

cmcglobal has seasoned staff with experience facilitating similar account transitions with several association clients. Our primary goal is to make the process as seamless as possible for you and your membership.

We appreciate your consideration and look forward to becoming part of your team.

Jeffrey D. Cummings
President



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CMCGLOBAL

OUR STORY

cmcglobal (originally Cummings Meeting Consultants), started doing business March 26, 1997. In the beginning, we were primarily an event & conference planning company. Over the years, our member-based association partners have been extremely pleased with our conference planning services. Because of this, we have continuously expanded our scope to include full-scale association management. Today, we provide various levels of professional services tailored specifically to each organization's needs.

Our offices are located in the historic Fishback House in downtown Indianapolis, however our team services a multitude of state, regional, and national organizations in various cities throughout the United States and abroad.



OUR --- **SERVICES** ---

Think of cmcglobal as the ultimate “One Resource” for all association management, convention, trade show, and special event needs. Drawing from the expertise of highly-skilled professionals, we provide the majority of our services in-house. Should we mutually agree that a service needs to be outsourced (ex: CPA services), those costs are transparent and passed through as actual expense.

We’ve reviewed your Scope of Requested Services and have verified that we currently provide similar support for multiple organizations. We strive to exceed your expectations well above and beyond what your RFP requires and are confident you will find our team to be a seamless extension of yours; a concept we refer to as team-sourcing. A summary of these services are noted on the following pages.

EXECUTIVE

MANAGEMENT

- Schedule and secure travel/logistical accommodations for board meetings (remote & in-person)
- Facilitate board report and agenda item collection/distribution
- Attend board meetings and act as secretary as needed
- Participate in strategic plan development and implementation
- Complete office support including dedicated phone, voicemail and document storage
- Provide marketing and website support
- Manage accreditation and continuing education, in conjunction with preferred accrediting bodies

MEMBERSHIP

SERVICES

- Receive/process all renewal/new memberships via mail, fax or online & coordinate member communications/updates
- Proactively solicit membership renewal notices and provide all corresponding communication (confirmations, etc.)
- Implement ideas to grow membership and provide clear membership benefits to enhance membership retention
- Facilitate member benefits such as awards, scholarships, and grants
- Design, implementation and logistical support for virtual conferences, webinars, virtual town halls and board meetings
- Email, phone, general office support 8:00 AM - 5:00 PM EST
- We use a variety of web-based member softwares, including but not limited to: MemberClicks, Cvent, Wild Apricot
- Coordinate with appropriate agencies to provide accreditation opportunities for members

MAINTENANCE

- Periodically provide requested reports (membership, financial, event)
- Issue deposit report complete with banking receipts monthly
- Periodically provide backup of database
- Electronic storage of historical/fiscal documents / maintained on a trio of servers throughout the United States
- Schedule automatic daily backup of membership database
- Perform routine maintenance of database to ensure integrity of data
- Storage of any physical items

FINANCIAL

SERVICES

- Transition accounting file into QuickBooks Enterprise Solutions (if needed)
- Establish new bank accounts or maintain existing accounts as directed
- Manage all aspects of accounts receivable and payables
- Provide reports to Director of Finance on a monthly or quarterly basis (as agreed upon), including but not limited to: monthly bank and credit card reconciliation statements, budget vs. actual reports, asset balance summary, CD summary reports
- Prepare Annual Operating Budget for review and approval by Finance Committee / Support and assist the Director of Finance in the management of the approved budget
- Disperse scholarship and research grants as directed
- Set up a Merchant Account to manage online payments and credit card payments
- Establish American Express account to pay expenses and create a rewards program
- Manage, reconcile, and report all financial statements on a monthly basis
- Assist Director of Finance /Treasurer in reviewing and implementing investment groups

CONFERENCES & EVENTS

Experts in our Field

We provide full service conference management, including but not limited to...

PRE-PLANNING

- Research hotel / city availability and history
- Arrange hotels to hold space on first option
- Analyze attendance history for budget projections
- Prepare break-even revenue/expense budget
- Prepare feasible options as a host site for annual conference
- Conduct site inspections of prospective hotel(s) and negotiate to determine which hotel is best suited for upcoming conferences
- Negotiate favorable terms / conditions in hotel agreements in order to minimize financial exposure to association
- Align hotel contract dates in best interest of association

REGISTRATION SERVICES

- Develop Registration Database and subsequent forms / applications
- Develop Presenter database and manage Presenter Information
- Facilitate design and implementation of on-line Presenter Proposal form
- Process all registration forms and fees
- Manipulate registration and presenter data in order to produce: Name Badges, Registration Receipts, Certificates of Attendance, Registration and Presenter Confirmations, Presenter Certificates, Presenter Packets
- Develop and produce periodic reports
- Supply on-site registration staff
- Order, store and deliver conference materials



SPEAKER ARRANGEMENTS

- Establish formal contract with proposed speakers based on information provided by client
- Once agreement has been reached, cmcglobal will facilitate speaker details to include:
 - Acting as a "call receiver" for speaker agents/speakers
 - Receiving and processing of speaker abstracts
 - Acting as a liaison between speaker agents/speakers and client (or designated contractor) for meeting set-ups and audio-visual needs
 - Scheduling air/ground transportation and hotel rooms for speakers as needed

MISCELLANEOUS CONFERENCE

- Convention Announcement Booklet
- Conference app set-up and management
- Mailings (electronic or hard copies) of appropriate documents and information
- Directional signage production
- On-site registration form / processing
- Award management
- Volunteer management
- Marketing / newsletters
- Conference website
- Conference evaluations
- Hotel logistics
- Audio-visual support
- Group dinner management
- Menu / pricing assistance
- Overall budget management

OUR **PROVEN EFFECTIVENESS**

And we can do more!

We are driven by creating experiences that deliver results for your association and for your members. Organizations who have used cmcglobal for their association management services have experienced the following:



ASSOCIATION MANAGEMENT

Full service support and daily consultation to your executive board. Guidance on best practices to make you more efficient and cost effective.



CONFERENCES & EVENTS

Increased registration & vendor/advertisement revenue through proactive marketing strategies, fresh communications, and fostering strong relations.



VOLUNTEERS

Effective volunteer management through the development of electronic registration, clear communication and follow up.



COMMUNICATION

Enhanced communications through the design of conference programs, apps, email communications, newsletters and vendor packets.



COST SAVINGS

Transparent pricing with no hidden costs and no markup. Additionally, we believe in sharing hotel commission revenue back to our clients.



ATTENTION TO YOUR MEMBERS

Friendly and professional support to membership-related calls and emails. Provide ideas to enhance membership benefits to grow the association.



In this ever-changing environment, you can trust our event experts to find a virtual solution tailored to your organization's goals and desired outcomes. For decades, we have created custom events and virtual training webinars that have exceeded client expectations, and continue to be committed to producing exceptional events. Our team thrives with outside-the-box thinking, and we are working tirelessly with our clients to produce full virtual conferences that rival an in-person experience. We are ready to help you navigate this new virtual space! While meetings and events must stay physically distant, our goal is to remain socially connected.



cmcglobal is a tireless resource and an expansion of your Board of Directors that is poised to take your association to new heights through dedicated staff, enhanced technology and sound financial guidance and accounting practices.

OUR **PRICING STRUCTURE**

FIXED ANNUAL FEES

Administrative Services

\$59,000.00/year

* Annual Pricing is based on the specific services requested in the Key Information document provided by AMC Institute and assumes the membership base consists of less than seventy-five current members as indicated on dgta.org.

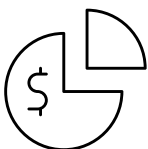
The additional comprehensive list of "Our Services" contained in this proposal are for informational purposes only and therefore not all are included in the Annual Pricing.

Furthermore, the Commission Sharing mentioned herein is only available to clients whom engage cmcglobal in full-service conference planning and therefore not applicable to this proposal.

Actual expenses will be passed through to the client void of any mark-up, including but not limited to: Membership Management Software annual expense, credit card processing fees, board & conference related expenses, and cmcglobal travel expenses.

Should cmcglobal be selected, we will develop a mutually agreeable payment schedule for all fees and expenses.

NO HIDDEN FEES + COMMISSION SHARING



At cmcglobal, we do not hide any fees or up-charge any services. We are completely transparent and only charge based on our contracted service fees. Outside of that, any real expenses by 3rd party vendors are what you pay.

cmcglobal is registered as a licensed travel agent. As such, **50%** of the hotel commission from sleeping room revenue may be collected and shared with our partners to offset service fees.

MEET OUR **FULL-TIME TEAM**



CORINNE EARLE
Sr. Project Manager
Since January 2007
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LAURA JACKSON
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Since July 2018
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KENDRA WARNE
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STEVE HILL
Targeted Sales
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ASHLEY HOUSEMAN
Accounts Receivable
Since January 2007
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PAMELA MCKINNEY
Operations HR
Since May 2017
pamelam@cmcglobal.com



ALLYSON MILLER
Accounts Payable
Since September 2005
allysonm@cmcglobal.com



DAVE SIBBING
US Sales
Since January 2010
daves@cmcglobal.com

OUR REFERENCES

DON'T JUST TAKE OUR WORD FOR IT...

ASSOCIATION FOR UNIVERSITY & COLLEGE COUNSELING CENTER DIRECTORS (AUCCCD)

SHARON MITCHELL

University of Buffalo

Current President

Email: smitch@buffalo.edu

Phone: 716-645-2720

AMERICAN COLLEGE COUNSELING ASSOCIATION (ACCA)

CHRIS CORBETT

Savannah College of Art & Design

Past President

Email: ccorbett@scad.edu

Phone: 912-525-6971

SOUTHERN ASSOCIATION OF COLLEGES & EMPLOYERS (SOACE)

CHARLIE WILDER

Auburn University

Current President

Email: charliewilder@auburn.edu

Phone: 334-844-6410

WEBSITE REFERENCES

www.aucccd.org

www.acca.org

www.soace.org

Additional references are available upon request

THANK YOU FOR CONSIDERING cmcglobal

We look forward to partnering with DGTA!

Should you have any questions related to this proposal, please contact:

Dave Sibbing

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