



Dangerous Goods Trainers Association (DGTA)

July 28, 2020

Dear DGTA Leadership,

We at Impact Association Management appreciate the opportunity to respond to the Dangerous Goods Trainers Association's RFP for Association Management Services. Our niche is working with small and medium-sized Associations just like yours. We are known by our clients for delivering cutting edge, effective, transparent, and cost-efficient services. We believe we're an excellent fit for DGTA and hope to have the opportunity to present our proposal.

Since 2006, Impact has been providing association management services for organizations like yours. Our staff consists of highly skilled Executive Administrators, all with a bachelor's degree and a minimum of 10 years of experience. We consider ourselves to be long-term partners with our clients and a part of their team; your goals, your volunteer and member satisfaction, and your success as an organization are all important to us.

In addition, we understand the importance of managing an organization's operations so that leadership can concentrate on developing strategic initiatives for your Impact team to implement – things like implementing strong marketing campaigns to raise awareness, developing and maintaining a successful business model, and guiding a growing, diverse membership.

Our team brings their vast experience of what has worked for other organizations, and also continuously participates in professional development to learn new ideas and unique opportunities. We're not only generators of ideas, but experts at implementation.

Finally, we would like you to consider that we have a number of clients who, before working with us, were entirely managed and operated by volunteers. We understand the need to minimize volunteer burnout, establish efficiencies and cost-saving processes and technology immediately, and how to continue to work with an active Board wanting to remain involved.

As an aside, while Impact is not currently accredited, we have begun the process and are working with the AMC Institute through their accreditation process. Our goal is to be fully accredited in 2020.

We look forward to the opportunity to show you how we can provide expert, cost efficient services that your group will be thrilled with. Thank you for your consideration!

Sincerely,  
Jodi Fisher, CEO and Founder  
[jodi@ImpactAMC.com](mailto:jodi@ImpactAMC.com)  
608.210.3120

---

5329 Fayette Avenue  
Madison, WI 53713  
608-210-3120

[www.ImpactAMC.com](http://www.ImpactAMC.com)  
[info@ImpactAMC.com](mailto:info@ImpactAMC.com)



WWW.IMPACTAMC.COM

# WHY IMPACT?



LEARN HOW WE CAN MAKE THE  
DIFFERENCE IN YOUR  
ORGANIZATION.

Impact's Proposal for the  
**DANGEROUS GOODS  
TRAINERS ASSOCIATION**

5329 Fayette Avenue  
Madison, WI 53713  
608-210-3120

[www.ImpactAMC.com](http://www.ImpactAMC.com)  
[info@ImpactAMC.com](mailto:info@ImpactAMC.com)



# RFP RESPONSE FOR ASSOCIATION MANAGEMENT SERVICES

## Executive Summary

---

Headquartered in Madison, Wisconsin, with an additional office in Nashville, TN, Impact Association Management has been providing top-notch association management services since 2006. We are a group of passionate, experienced Administrators who are here to serve our clients, help them improve processes, and ultimately grow their organization. We pride ourselves on developing great relationships with our clients – we want your leadership and members to truly enjoy partnering with our team.

Impact has a team approach which means you will have 2 dedicated Executive Administrators (EAs) for your organization. This allows us to support you as you continue to grow and needs change and will also ensure you have continuity and capable support, regardless of planned or unplanned office absences.

We also work with an incredible team of Consultants for specialty services such as fundraising goals, legislative initiatives, lobbying, and accounting services that we can bring on as needed for customized support.

Our team is held accountable to your leadership and is here to manage your organization as well as work alongside the Board of Directors to focus on and further develop your strategic goals.

We currently have 13 staff who work both full- and part-time as client demands fluctuate. We average about 30 clients in a variety of industries including medical, healthcare, agricultural, engineering, academic, trade, scientific, professional services, and financial, among others.

We encourage you to view our [Team list](#) (not all specialty Consultants are listed) and [Client list](#).

# Proactively guiding associations forward.

DGTA will benefit from the experience we have specifically related to you in a number of ways:

- 1. We understand your industry, your structure, your members, and their challenges.** We currently support National volunteer led organizations that have strong certification and education components.
- 2. We understand your needs.** The organizations we support have similar challenges to you. You are not a small fish in a big sea – on the contrary, you will be just as important and valued as every other client we serve.
- 3. We have success stories.** Impact has experience growing and retaining membership, developing and implementing successful marketing campaigns, and establishing efficient, sustainable, and transparent operations and processes. We are active in the Association Management community, serve on leadership roles within our industry, and mandate professional development for our staff to continue to educate themselves on strategies and plans on these very topics.



Small-Medium  
Sized Organizations



- 4. We have 14 years of experience.** We have done precisely what you are looking for and are confident we will exceed your expectations. You can [read here](#) what other Associations say about our services and capabilities. We have worked in a wide variety of Association structures, industries, and sizes, and that broad range of experience makes each of our staff well-rounded and knowledgeable. We realize that everything we do ultimately must be in some way helping the organization grow, retain, and improve membership.

5. **Budgets are a concern.** Always. We are very different in how we bill for our services.

**a. You have control.**

- i. **Hourly rates.** This invoicing style gives you complete control over the budget. You can cap your time at whatever services meet your needs and budget, allowing for a consistent and planned budget line item.
- ii. **Only pay for what you need.** Most AMCs charge a flat rate allowing them to pad their time, assume a high estimate, or make you pay for any time or services not used. Not Impact.
- iii. **Plan ahead.** You are able to prepare your budget for additional time needed at conferences, renewal periods, or other higher than normal volume months. We will help you develop this budget so that it is planned in advance.

Make the most of how  
your time is spent.



**b. Transparency.**

- i. **Detailed timesheets.** Along with each monthly invoice you are provided a detailed breakdown of exactly how your time and services are being spent.
- ii. We have supplied a sample timesheet along with this RFP to show you just how transparent our services are.

In a nutshell, we **successfully manage** the operational, financial, meeting/event, and administrative functions of organizations so that leadership can concentrate their limited time and **unlimited passion** on the few core, vital missions of their organization.



Curious about how we adapted to the COVID-19 pandemic and the ways we were able to quickly pivot our services to help, support, and inform our clients? [Check out our COVID-19 website page!](#)



## Scope of Services

---

*There wasn't an RFP included with the management services form submission on the AMC Institute's website, so we will cover the main areas of service we provide to full-service clients. Because we bill hourly, we're able to offer flexibility in services based on need and budget.*

*We are happy to give more information on the following services, or any services you need not covered within.*

### **1. General Office Services**

In order to serve as a contact point for your members, your Executive Administrators (EAs) can manage your general office requirements including standard mail, phone, fax, voicemail and organization-branded email. We also offer our office as your published Headquarters address.

There are 2 options for responding to phone calls:

1. We can set up a voicemail account for your organization for a minimum charge. Voicemail will be checked and responded to frequently throughout the day.
2. We offer dedicated receptionist services, where your phone calls will be answered by a live, fully trained receptionist. They will forward calls, handle calls, answer FAQs, or take messages as appropriate. This is an additional cost to your EA service plan (details in the pricing section below).

We have a fully equipped office and are able to work with all of your databases, web platforms (design and hosting), conference call services, email broadcasting services, and financial programs or can suggest budget friendly alternative options if you are open to moving platforms. If moving to new platforms we will handle the set-up, migration, testing, and implementation.

We require that all email is responded to within 24 business hours, and all voicemails are returned within 1 business day.

### **2. Marketing Management**

It's exciting to us to be part of a strong membership growth, diversification, and engagement initiative! A significant part of that growth will be creating a comprehensive marketing plan to bring awareness, share relevant information, engage with potential members, and ultimately convert that audience into paying, long-term members.

We have become experts at developing and implementing membership marketing plans, social media strategy, and event marketing campaigns in order to grow membership, increase member retention rates and event participation, and engage markets interested in sponsoring and supporting your organization in order to diversify revenue streams.

Strategy, goals, and analytics will all be discussed, tracked, and analyzed, and we will regularly review to modify and improve activity.

In addition, we do LOTS of continuing education on marketing for Associations. We look forward to bringing ideas, participating in brainstorming sessions, and sharing successes/failures from past strategies we have worked with.



It is key to identify, develop, and market key member benefits. We have a wide range of experience collecting data, developing benefit programs, and, most importantly, marketing those benefits and ensuring members are taking advantage of them. It is critical to identify the top reasons why members renew and do everything we can to make sure they are continuing to receive those benefits, stay in touch to ensure benefits stay relevant, and leverage those benefits to entice new members to join and lapsed members to re-join.

In addition, we will work to identify and market to areas of revenue growth and diversification. Sponsorships, e-commerce, and educational offerings are just a few options to consider; our job is to study your organization and its potential and recommend relevant initiatives.

Please take a look at our case studies at the bottom of this document to see a couple of our success stories in growing and retaining membership, increasing event attendance, and increasing online presence and engagement!

### **3. Financial Management**

We are experts at Financial Management and can support all your financial needs according to organizational procedure or develop a process as appropriate. Your EAs can administer all aspects of financial operations including:

- Monthly / quarterly reporting and financial statement preparation
- Bookkeeping / transition management
- Invoicing
- Payment processing (credit card or checks)
- Creating receipts
- Reconciling accounts
- Coordinating and working with outside CPA on financial review, reporting, and/or audit
- Annual budget preparation and ongoing management
- Dues invoicing and collection
- Management and support of federal and state filings and compliance
- Development, review, and implementation of prudent financial policies and procedures

We are well-versed in QuickBooks, both in the setup as well as the management and maintenance of the system. From managing transactions, to helping with tax preparation, to handling payment reminders, to reporting, to creating budgets, to credit card processing, we offer a full-service experience.

### **4. Membership Management**

We understand the importance of your members and partners and their data. We specialize in keeping accurate records including data on member acquisition, member contact information, and member renewal information.



Along with keeping accurate and current data, managing processes is critical. Membership drives, tracking renewal cycles, and tracking and reporting member data will be handled professionally, timely, and efficiently.

We have broad experience with a number of membership software platforms including Wild Apricot, YourMembership, MemberClicks, and others, and can easily learn yours (if need be) or recommend an alternative database based on our experience, if that's more appropriate.

## **5. Communications**

### Website

Website management is something most of our clients request. We can help maintain your website including content, event details and registration, member directory, images, newsletters, and permission levels as needed. We are extremely efficient and knowledgeable in handling content, image, and event updates in programs such as Wild Apricot, Wordpress, YourMembership, Member Clicks, and others. We can either work with your current web platform or offer suggestions on all-in-one, budget friendly platforms that incorporate website, events, database, financials, and member renewal.

### Social Media

Strong and relevant marketing is a vital function of every organization, and something we manage to great success for our clients.

The first step is creating a strong, relevant, and engaging editorial plan that may include press releases, newsletters, webinars, email communications, and social media marketing. We will identify ways to find and distribute solid industry knowledge, discover and fix weaknesses and areas of communication that are relevant and desired by your member base, and repurpose content and video from industry events, publications, and online posting.

In addition to content development and posting and distribution, all accounts will be monitored, memberships will be managed, standards will be upheld, branding guidelines will be created and followed, and analytics will be reported, including recommendations for moving forward. We have deep experience in all social media platforms.

### Email Campaigns / E-Newsletters

E-communications should grab a reader's attention, compel them to action, and contain relevant, timely information important to them. Your dedicated team has experience in curating content, working with article contributors, meeting deadlines, and creating, formatting, copyediting, finalizing, and distributing email and e-newsletter campaigns, as well as analyzing open and click through rates in order to ensure successful communications.

We have experience in Constant Contact, Mailchimp, and other communications platforms.

## **6. Meeting Management**

Our EAs are experts in supporting educational programs, networking events, annual conferences, workshops, trade shows, and fundraisers, and webinars and meetings (both virtual and live). Our team can manage the full range of event planning as needed, including:





## Planning

- Negotiate venue space, food and beverage, A/V and signage, and hotel contracts
- Assist and communicate with exhibitors, vendors, speakers, and sponsors for all arrangements, materials, paperwork, marketing, etc.
- Online registration set-up, maintenance, and reporting
- Create registration lists, nametags and other materials for events
- Develop schedule and conference timetable
- Volunteer and committee assistance/management

## Financial Management

- Online registration payment processing
- Develop and manage event budget
- Develop and support sponsorship sales plan (if needed, we do have outsourced help available at an additional fee to sell sponsorships)
- Collect fees onsite
- Submit invoices for approval and submit payment to vendors

## Marketing

- Brochure and conference material design and development
- Create and manage marketing schedule
- Create and distribute invitations via email
- Create event content for website, social media, and e-newsletter, post to all outlets
- Manage CEU request and submissions, if applicable

## On-site support

- Venue logistics (room layout, A/V, signage, etc)
- Food and beverages
- Attendee registration
- Staff registration desk, distribute badges and materials, and track attendance
- Manage volunteers, sponsors, and speakers

## Post event

- Help develop and send out post event e-survey
- Manual entry of correct registrant information into registration system, prepare reports
- Post event financial reconciliation and billing

## Cost Savings

- We demonstrate the effects of our negotiations in a summary report outlining all cost savings that resulted from the negotiation process, including hard dollar, human capital investments, and risk mitigation. As an added service, we coordinate with your policy on the allocation of hotel affinity points, allowable concessions, upgrades and other valuable, negotiated items.



## **7. Operations**

We know that efficiently managing all of the operational activity is vital. In addition to keeping on top of all the pending and upcoming tasks, we will create and maintain processes and procedures to go along with each area of responsibility to ensure consistency, accuracy, and efficiency, as well as maintain contracts as appropriate. We will also recommend processes and/or tools to further refine and improve workflow.

We understand the critical nature of responsiveness with leadership, volunteers, members, and the general public. Impact requires that all communication be handled with extreme professionalism, responsiveness, and efficiency, whether it's receiving and processing contracts and renewals of agreements, transitional calls with the incoming president, or simply daily correspondence. We take our operational role and being the face and voice of your organization very seriously and work diligently towards positive interactions in everything we do.

## **8. Staff/Committee/Board Support and Coordination**

### Board Meetings

We are well versed in supporting the needs of your Association's Board and committee meetings whether they be virtual or face-to-face. We can help with developing and distributing the agenda, meeting planning, creation of reports, sending reminders, all of the logistics of in-person meetings, management of teleconference meetings, taking and distributing minutes, and managing action items and follow-up. As needed, your EAs can be on-site.

### Staff and Committee Support

Your dedicated EA team will provide organizational support, service, and oversight as needed. We understand the generality and flexibility needed to support Committees and staff, and the critical nature of responsiveness with staff, leadership, volunteers, members, and the general public.

## **9. Other Services**

We understand that it's impossible to capture every single task and responsibility the AMC will be responsible for, as well as to guarantee what future leadership and budget will look like. We are able to be flexible with the scope of services so that your organization is being appropriately managed as it grows, changes, and evolves.

We respect the fact that all of your leaders are volunteers, doing what they can for your organization on top of work and life demands. We are happy to take the burden off that commitment and passion to work alongside them to set and accomplish goals and tasks.



## Financial Considerations

---

Impact invoices on the 1<sup>st</sup> of each month. Monthly charges are based on the package you choose at start of contract, as well as any additional time needed (and pre-approved) for the prior month, above the minimum time of your package.

Example: It is April 1. Your package is 50 hours/month, but your EAs worked 55 hours in March (the additional 5 hours were pre-approved by you). Your April 1 invoice will be 50 hours of service to be provided in April, as well as the 5 additional hours you received in March.

Each month, you will be provided a timesheet along with your invoice, detailing the services provided throughout the prior month, down to the second! We believe in being completely transparent with our costs. Packages are as follows:

Basic Package:	\$60/hour	20 - 49 hours/month (minimum invoice \$1,200)
Upgraded Package:	\$56/hour	50 - 99 hours/month (minimum invoice \$2,800)
Premium Package:	\$52/hour	100+ hours/month (minimum invoice \$5,200)

Onboarding Fee: \$750 one-time fee

*Providing you with the most successful onboarding possible is our top priority. This standard one-time fee covers technology set-up as well as a dedicated Transition Specialist. Our Specialist will work with you every step of the way to ensure a smooth onboarding experience. Your time is valuable, and by offering oversight at this critical stage, our team will work to complete onboarding as efficiently and strategically as possible.*

All operational management services are included in your package cost. The following specialty charges will be applied if utilized:

- Dedicated receptionist services: \$25/month (technology cost)
- Voicemail only services: \$5/month
- Various storage options and fees
- CPA and legal services: fees vary by consultant or firm
- Legislative services: fees vary by consultant or firm
- Supplies and equipment purchased on your behalf

We also offer a \$1/hour discount for contract terms of 3+ years.



## The Impact Team

---

Each client receives two dedicated EAs as their primary team who have access to our entire staff if additional expertise is needed or backup is required. Your EAs will document your processes and procedures so other staff can step in to help if needed. We work, support, and manage as a team to provide our clients with the best experience and knowledge possible.

While we cannot guarantee who your dedicated EA staff will be due to possible capacity changes during your RFP process, we can tell you about a couple of our highly skilled EAs. We will be sure to match you with the team best suited to your needs at the time of contract implementation.

In addition, you will be supported by our Director of Operations and our CEO during transition and onboarding, as well as our throughout the lifetime of our partnership.

### Jodi Fisher (Founder and CEO)

---



In her off time, Jodi loves to travel, work off her stress at the gym, camp with her family, watch the Badgers, and pretty much anything outdoors when Wisconsin weather cooperates!

Since 1995 Jodi Fisher has been providing executive support to Associations, Fortune 500 companies, small business owners, and non-profit organizations, and in 2006 she founded Impact Association Management. Jodi guides her team to successfully manage small and medium sized Associations located throughout the country.

Her passion lies in developing her staff to provide efficient, professional services that ultimately lead to strategic, continuous organizational growth for our Association clients.

Jodi serves on leadership roles in the Association Management community, has been highlighted in several publications for small businesses, and sincerely enjoys the challenges and successes of continuing to grow Impact and creating a culture where staff feel valued and have fun.

## Kirsten Reader (Director of Operations)

---



*In Kirsten's free time, she enjoys spending time with her family outdoors, reading, running, and cooking. Kirsten is also an active member with the Junior League of Madison, and just completed her one-year term as President.*

Kirsten has experience in both the non-profit and government sector, with an emphasis in member and stakeholder relations, leadership, strategic development, public relations and communications strategy, and customer service. She also has practice with managing Boards, leaders, and volunteers with the perspective of serving on Board leadership positions herself. Her problem-solving mindset helps our Association clients grow and flourish.

At Impact AMC, our new clients work with Kirsten during the integration process to ensure a smooth transition for all parties, as well as ensuring our team is set up to successfully accomplish the client's strategic goals and plans. In addition, she works with all of our clients throughout the entire partnership to revisit those goals, discuss new ideas and strategies for organizational growth, and to ensure client satisfaction in all areas of management.

Kirsten also supports our team to ensure they have all the tools they need to successfully support our clients. Kirsten is in constant communication with our team which gives insight on new programs, strategies, and procedures to implement.

## Jenny Dorsten (Executive Administrator)

---



*When not working, Jenny can often be found soaking up the outdoors with her family. She also enjoys traveling, reading and amateur attempts at gardening.*

Jenny's fifteen-year career in nonprofit management includes extensive work with associations and chambers of commerce. She is adept in providing strategic direction, supporting boards, managing finances, developing successful sponsorship and fundraising campaigns, executing events, and member communications. She well understands the breadth of responsibilities required to operate successful associations, and enjoys working with association volunteers and the enthusiasm they bring to their fields.

Jenny holds a Master of Public Administration degree from Arizona State University and a Certificate of Nonprofit Management from Duke University. She has served on numerous nonprofit boards and committees, including as an association officer, and has firsthand experience with the work association volunteers do.

## Ann Smith (Executive Administrator)

---



*Ann's favorite thing in life is spending time with her four siblings, her spouse and her silly, affectionate shelter dog.*

Ann brings over 25 years of Association management experience to the Impact team, most recently serving as President/CEO of a business association. Ann has managed all facets of a non-profit association including strategic planning, budget creation and management, management of conferences and events, securing sponsorships, website management, Board relations, advertising/marketing, and membership.

Ann previously worked with Friends of WHA-TV/WI Public Television as Events Manager and organized statewide events - including the annual Garden Expo at the Alliant Energy center, for which she won a PBS development award.

She has a Bachelors Degree from UW-La Crosse, and a Certificate in Non-Profit Management.

We hope that throughout our response we have shown how our team can help meet the immediate challenges as well as fulfill the future goals of your organization.

## Transition Process

---



The transition typically takes about 6-8 weeks and is guided by our Director of Client Operations (DCO).

1. **Kickoff Call.** The process starts with a call that allows you to get to know your team and help them understand your needs, motivators, priorities and goals. Your team will get started on these items immediately following the call.
2. **Transition Checklist.** We then share a sample checklist for you to complete that covers all the items we expect to need such as necessary account information, electronic files, and procedures.
3. **Weekly Check-In Calls.** In addition, we recommend weekly check-in calls for the first couple of months for a quick and successful onboarding of your team to your organization. These 15-20 minute calls will discuss training, address challenges and issues, answer questions, and clarify goals and priorities.
4. **“As Is System”.** We begin our partnership managing your organization in the way that it has historically been managed. At the end of 8 weeks we expect everything to be completely transitioned over, the majority of challenges and questions completed, and our staff feeling fairly comfortable in the operations of your organization.
5. **Introduction to the Board.** In order to ensure a successful beginning to our partnership, Impact will give a short presentation to your entire Board sharing the scopes of work we will be responsible for, introducing our team, reviewing expectations, and answering any questions they may have. This presentation typically takes about 30 minutes and can either be part of your next Board meeting agenda or as an additional quick Board meeting shortly after we contract with you.



6. **Increasing Efficiency.** After around 8 weeks, your team will begin to look at areas of increasing efficiencies, reducing costs, and meeting other stated goals. We take part in strategic planning sessions and budget development efforts to ensure current and future goals are well defined, reported on, and consistently updated. We will document processes along the way and will continue to monitor for improvement in operations throughout our partnership with you.
7. **Quarterly Calls.** Our Director of Operations will conduct quarterly calls to your Board President to check in on our partnership. This is your opportunity to bring up challenges, adjust goals or scope of service as appropriate, and generally have a short review of how things are going. We want to ensure a valuable experience throughout your duration with Impact! Ongoing management communication and improvement is not billable to your organization.



All other services are provided on an hourly basis, including the transition activities. We are very familiar with the onboarding process and have done it many times, so you can be confident the transition time and costs will be kept to a minimum. Any training and transition time simply go towards your monthly hourly package commitment.





## Client List and References

---

We are happy to provide the following references; we do, however, ask that you notify us before contacting them, so we can give them the courtesy of expecting your call.

You are also welcome to view all of our clients on [our website](#).

International Personnel Assessment Council <a href="https://www.ipacweb.org/">https://www.ipacweb.org/</a> George Vaughan, President <a href="mailto:President@ipacweb.org">President@ipacweb.org</a>
Surfaces In Biomaterial Foundation <a href="http://www-surfaces.org/">http://www-surfaces.org/</a> Angela DiCiccio, President <a href="mailto:diciccio@google.com">diciccio@google.com</a>
Wisconsin Funeral Directors Association <a href="http://www.wfda.info/">http://www.wfda.info/</a> Camelia Clarke, President <a href="mailto:camelia.clarke@gmail.com">camelia.clarke@gmail.com</a>

If you choose to contract with us, we will happily provide financial references from our bank (BMO Harris) and insurance company (Tricor Insurance).

## Impact Association Management Company Statements

---

### **Mission Statement:**

Provide customized, transparent, and forward-thinking association management services to small and medium sized Associations with a highly skilled, dedicated team of Executive Administrators.



### **Culture Statement:**

To provide a professional, fun and focused environment in which staff feels empowered to work independently, inspired continue developing personal and professional skills, and supported as part of a team.

### **USPs (Unique Selling Propositions):**



We love what we do, and it shows. Our team is passionate about supporting Associations and becoming *partners* in order to surpass goals and achieve milestones. As partners, we find great value in developing relationships with our clients. We are real people with different personalities, skill-sets and strengths. We celebrate this diversity and believe in having FUN while providing top level professional services to our clients.



We specialize in small-medium sized Associations. We understand the unique challenges and benefits that align with these organizations. While each client is unique, we believe in sharing the strategies and successes we've experienced in the past rather than reinventing the wheel. Regardless of how long our clients have been established or what phase they are in as an organization, we believe they deserve the best customer service, support and resources regardless of their size.



We believe in transparency. We hold ourselves to extremely high standards when it comes to ethical business practice. From day one we are working hard to establish trust with our clients. We often pick up the pieces from previous broken partnerships and this has given us the knowledge of how to do things right, right from the start. From our contracts to our invoices and everything in between, we respect our clients too much to keep anything in the dark.



## Testimonials

---

“We have been very pleased with the association management services that Impact provides. After an extensive evaluation process, we selected Impact based on their focus of supporting non-profit organizations, their professionalism and flexibility, and the outstanding level of service that they provide to their clients. Our EA has done an outstanding job in providing association management services and has a great depth and knowledge of the Wild Apricot membership/ website platform. By migrating to this new platform and association management services, we have seen immediate increases in new members and customer satisfaction. The service that Impact provides will allow our leadership to focus on strategic initiatives for our members. I have recommended Impact to several other non-profit organizations as I truly value the services that they provide.” ***Sharon Schraith - Association of Training & Development, Southeast Wisconsin Chapter***

“Our organization was looking for an administrative service agency who valued transparency, who was efficient and comfortable with using newest technology tools. Being volunteer led in the past, it took a change of mind to go with a management company like Impact. Ultimately we did switch and would never go back.” ***Aga Artka- American Society of Interior Designers – Wisconsin Chapter***

“With our former management company, we had been struggling financially and found ourselves in a bad spot. We were paying too much in operating costs, we were unhappy with the web platform our management company had us on, and the National organization had just announced a year-long rebranding initiative. Another chapter recommended Impact to us. Our EAs were instrumental in getting us on a new web platform, taking over all of the operational functions for our chapter, and getting us back on track financially. Our Administrator has been wonderful to work with. She is thorough, detail-oriented, and professional. She always makes sure members and non-members alike have a positive impression of our chapter. She took over administration of our two-day conference last year in the middle of planning, and she did a better job by herself than our previous company did with 5 or 6 people. Overall, we are looking forward to many more enjoyable and productive years with them.” ***Janet Mancini - Association for Talent Development – Greater Twin Cities (ATD-GTC)***

### Video Testimonials:

[South Metropolitan Business Association](#)

[Wisconsin Rural Opportunities Foundation](#)

***We look forward to hearing back from you with questions and/or next steps,  
and thank you for the opportunity to share what partnering with Impact  
Services can do for the Dangerous Goods Trainers Association!***

# CASE STUDY 1

"Our organization was looking for an administrative service agency who valued transparency, who was efficient and comfortable with using newest technology tools. It took a change of mind to go with a company like Impact. Ultimately we did switch and would never go back."

## SINCE PARTNERING WITH IMPACT IN 2015

↑ 108%

Increase in attendance at Annual Conference

↑ 60%

Increase in total annual membership

↑ 30%

Increase in consistent open rate for e-newsletters

## OUR INFLUENCE



### WILD APRICOT WEBSITE

Integrated existing platform for a seamless transition



### HANDBOOK

Processes and procedures documented



### HISTORICAL DATA

Records and Databases merged, updated and maintained



### MEMBER FEEDBACK

Transitioned documents to electronic versions

Impact Association Management supports small to medium sized Associations. We believe that these groups deserve the same level of management and administrative support as large national organizations.



# CASE STUDY 2

“With our former management company, we had been struggling financially. We were paying too much in operating costs, & we were unhappy with the web platform we were on. Impact was instrumental in getting us on a new web platform, taking over all of the administrative functions for our chapter, & getting us back on track financially.”

## SINCE PARTNERING WITH IMPACT IN 2015



**70%**

**INCREASE in Sponsorship Revenue**



**77%**

**INCREASE in Overall Revenue**

# 2017



**Record attendance at Annual Luncheon**

Impact Association Management supports small to medium sized Associations. We believe that these groups deserve the same level of management and administrative support as large national organizations.



# CASE STUDY 3

“Impact has been responsive to the needs of our growing non-profit, helping us streamline our membership/event administration as we transitioned from all-volunteer operations.”

## BEFORE

partnering with Impact



### ONLINE PRESENCE



Zero online presence.  
No Organization accounts on social media. No e-newsletter or consistent Member communication.

105 Facebook Followers.  
70 Active Members in LinkedIn private group.  
38% average open rate for e-newsletter (21% industry average).



### ANNUAL BUSINESS EXPO



Operating at a loss of -\$1400.000

Brought in \$2,400.00 profit in 2017



### TECHNOLOGY



Mailed paper invitations.  
Mailed RSVP's required.  
Checks only.

Online event registration. Online payment processing implemented for all events, luncheons and dues.

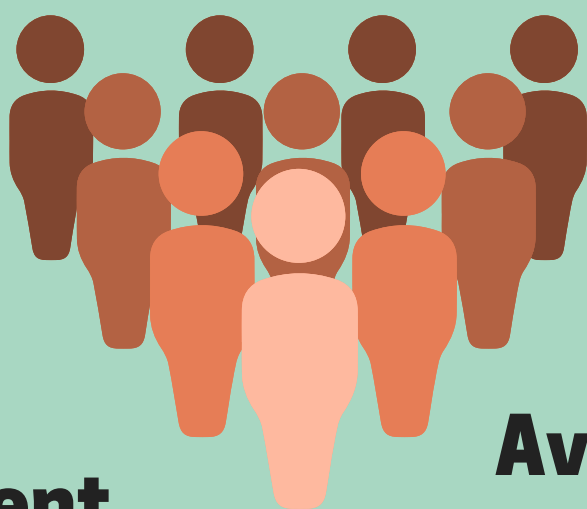
Impact Association Management supports small to medium sized Associations. We believe that these groups deserve the same level of management and administrative support as large national organizations.



# CASE STUDY 4

“Our two Executive Administrators on the Impact Staff do a magnificent job of understanding and meeting our needs, looking for ways to improve our operations, and realizing that their actions have a direct impact on how OSHP is perceived by its members.”

**Impact works with each client to identify their niche and comes up with member retention solutions specific to them**



**Year Client  
Joined Impact**

**Average  
Retention Since  
Partnering**

**2016**

**83%**

**2016**

**95%**

**2018**

**97%**

Impact Association Management supports small to medium sized Associations. We believe that these groups deserve the same level of management and administrative support as large national organizations.

