



December 12, 2016

Roberta L. Spencer
Executive Director
System Dynamics Society
Milne 300, Rockefeller College
135 Western Avenue
University at Albany
Albany, New York 12222

Dear Ms. Spencer:

Capitol Hill Management Services (CHMS) is pleased to submit this proposal in response to the Request for Proposals issued by the System Dynamics Society (SDS). With 35 years of experience, CHMS has developed significant expertise in all areas of association and non-profit management.

Based on our discussions, we propose to work with your leadership to ensure continuity and excellence in service as you undergo significant staff transitions over the next few years. Together we will establish a model for operational success and a timeline for the commencement of services by CHMS in each area of responsibility. CHMS is prepared to support SDS at whatever pace the organization requires.

CHMS will provide an outstanding level of association management services to SDS. We offer an elite professional team with expertise in all facets of association management. We utilize an unmatched online financial management program that allows you to maintain full control of your finances while the day-to-day work is performed by a skilled accounting team. We propose an experienced and talented conference management team led by our Director of Meetings, an accomplished professional who has achieved the Certification in Meeting Management, the premiere designation achieved by highly accomplished members of the global meeting industry community. Most importantly, we offer our unwavering commitment to achieving the goals and objectives of the System Dynamics Society

To assist you in the challenging review of proposals, we are providing a Proposal Summary Form which outlines basic information regarding our company, services, and fees. The complete proposal describes in detail the expertise we offer and the quality of the services we provide.

We look forward to meeting with you to discuss how we may be of service to your organization. Thank you for your consideration of Capitol Hill Management Services.

Sincerely,

A handwritten signature in black ink, appearing to read "John A. Graziano, Jr.", written over a light blue horizontal line.

John A. Graziano, Jr.
President



PROPOSAL SUMMARY FORM

Proposal to: System Dynamics Society (SDS)

Submitted by: Capitol Hill Management Services, Inc. (CHMS)

Founded: 1981

President: John A. Graziano, Jr.

Locations: Albany, New York and Raleigh, North Carolina

Proposed Location: Albany, New York

Number of Clients: 52: international, national, regional, statewide

Size of Clients: Annual budgets - \$120,000 to \$3.5 million
Membership - 90 to 6,000

Number of Staff: 42

Specialties: Full Service Management
Licensing & Certification
Continuing Education
Conference Management
Bookkeeping and Financial Management

Pertinent Information: CHMS will work with your leadership to ensure continuity and excellence in service as you undergo significant staff transitions over the next few years. We are prepared to assume responsibilities immediately and are prepared to do so at the pace required by the organization.

Price: During the transition, pricing will adjust as CHMS assumes additional responsibilities.
Upon implementation of full service association management and the assumption of all responsibilities as outlined in the Scope of Services - Attachment A, CHMS offers 2 options:
Option One
Full Service Association Management
Executive Director to be provided by CHMS.....\$360,000.00
Option Two
Full Service Association Management
Executive Director to be provided by the System Dynamics Society.....\$246,000.00

Additional Information: CHMS plans and produces over 200 successful conferences, tradeshow, educational meetings, and events each year. We manage all aspect of events, including planning, budgeting, site selection, marketing, registration, and onsite management



A Complete Solution with Proven Results

Proposal to:
System Dynamics Society
to provide
Association Management Services

Submitted by:
Capitol Hill Management Services, Inc.
230 Washington Avenue Extension, Suite 101
Albany, New York 12203
December 12, 2016

Contact:
John A Graziano, Jr.
john@caphill.com
518.463.8644 office
518.577.1710 mobile



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EXECUTIVE SUMMARY

Capitol Hill Management Services, Inc.

Capitol Hill Management Services (CHMS) is a comprehensive consulting firm specializing in association management, financial management, event planning, continuing education, and all areas of non-profit development. CHMS was founded in 1981 by John A. Graziano, Sr. and quickly established itself as a premiere association management firm in New York State. The company was purchased in 2000 by John A. Graziano, Jr., and under his guidance has experienced tremendous growth. CHMS now operates with a staff of 42 professionals located in our offices in Albany, New York, and Raleigh, North Carolina.

CHMS provides full and select services to international, national, state, and regional organizations. The annual budgets of our association partners range from \$120,000 to \$3.5 million and membership sizes from 90 to 6,000.

(Please see Appendix A – CHMS Association Management Clients)

CHMS offers individualized services to our clients. We work with each organization to evaluate their present and future needs and develop a work plan designed to accomplish the goals and objectives of the organization. We have assisted dozens of associations in streamlining procedures, increasing membership and non-dues revenue, achieving financial stability, improving attendance at conferences and events, and enhancing the visibility and vitality of the organization.

CORPORATE VALUES

“The vision of CHMS is to become a true partner in the success of our clients by providing significant expertise, outstanding service, and an unwavering commitment to achieving the goals and objectives of the organization.”

We are guided by three core values:

Integrity

All staff members will conduct themselves in an honest and principled manner.

Excellence

We will strive to provide the highest level of professional services on behalf of our clients.

Commitment

We are fully dedicated to the success of our association partners.

CHMS has abided by these core values for 35 years, making each client's mission its own. The CHMS team will incorporate Integrity, Excellence, and Commitment as we work together to pursue the vision, goals, and objectives of the System Dynamics Society.

CHMS is widely recognized for an unwavering commitment to the success of our clients. We adopt new ways to utilize technology to enhance and upgrade our organizational operations. Our association management team possesses the diverse experience and expertise to provide quality service to your organization. By providing educational opportunities for our staff, CHMS is able to enhance and improve services to our clients. CHMS holds memberships in several professional organizations throughout the country which offer workshops and seminars on best practices for association management professionals.

CHMS holds memberships in the following associations:

AMC Institute
American Society of Association Executives
Association Executives of North Carolina
California Society of Association Executives
Empire State Society of Association Executives
New York Society of Association Executives
The International Air Transport Association

As a member of AMC Institute, CHMS abides by the AMC Institute Code of Ethics & Professional Practice and the AMC Institute Membership Eligibility Requirements.

CHMS is IATAN accredited by the International Air Transport Association, a globally recognized accreditation program that has been servicing all facets of the United States travel and tourism industry for over 20 years. Whether planning a multi-day convention or simply organizing a monthly or regional meeting, CHMS has the appropriate hotel, lodging, and industry related contacts to ensure your event or meeting is a success.

CHMS offers a talented and experienced staff who deliver unrivaled management, administrative, and accounting services to our association partners. Staff tenure at CHMS ranges from one year to nearly 30 years with experience in a variety of disciplines. Turnover rates are low as CHMS staff enjoys working in a professional environment with a variety of association clients. All members of the CHMS team possess a minimum of a Bachelor's Degree and many possess a Master's Degree. Employees receive in-house training when beginning employment with CHMS, and this training continues several times throughout the year.

CHMS employees are encouraged to participate in continuing education opportunities provided by organizations in which we hold memberships. Four CHMS staff members have received the Certified Association Executive credential from the American Society of Association Executives and six others are completing the process for certification. The CHMS Meeting Planner is a Certified Meeting Professional and has received her Certification in Meeting Management, the premiere designation achieved by highly accomplished members of the global meeting industry community. Three CHMS staff members have earned the recognition of "Rising Star" presented by the Empire State Society of Association Executives and one team member was recently selected for the American Society of Association Executive's Center for Association Leadership Diversity Executive Leadership Program (DELP), as one of 12 scholars chosen from a national pool of over 700 applicants.

All team members work under the supervision of our elite Executive Team which is well-equipped to provide a strategic level of advice and assistance, having successfully managed significant non-profit and for-profit organizations. Our combined years of experience in organizational and financial management, strategic thinking, goal setting, and development will be available to your organization.

(Please see Appendix B – Executive Team)

RFP OBJECTIVE

System Dynamics Society (SDS)

The System Dynamics Society (SDS) is an international, nonprofit organization devoted to encouraging the development and use of System Dynamics and systems thinking around the world. The Society has members in seven countries and provides a forum in which researchers, educators, consultants, and practitioners in the corporate and public sectors interact to introduce newcomers to the field, keep abreast of developments, and build on each other's network.

SDS is a well-established and effective organization, currently managed with the support of the State University of New York at Albany. As several key employees will be retiring over the next few years, the leadership of SDS is exploring alternative models for management. Additionally, they are looking to establish a long-term transition plan to ensure the continuity and excellence of service to members, the Policy Council, and stakeholders of SDS.

Capitol Hill Management Services is uniquely qualified to provide services to SDS. We are experienced in working with companies in transition and have successfully implemented models for the sharing of services during the transition period. We are fully prepared to provide support to SDS at whatever pace it requires. We are flexible in our approach and seek always to meet the needs of our association partners.

Capitol Hill Management Services will provide outstanding services to SDS in all required areas. We have successfully assisted dozens of organizations to stabilize and grow membership. We create the necessary infrastructure to actively support and strengthen programming and member interaction at all levels of an organization. We have an outstanding financial management program which allows you to retain full control of your finances while the day-to-day work is performed by our skilled accounting team. We provide timely and interactive communications with members through websites and social media sites. We offer a talented conference management team led by an elite meeting professional. Most importantly, we will provide our unwavering commitment to achieving the goals and objectives of the System Dynamics Society.



A Complete Solution with Proven Results.

“CHMS has provided excellent service and great value to the Academy of Certified Archivists (ACA) for many years. They have been a reliable and important partner for the Academy—managing our daily affairs, providing excellent financial management and administering our certification examination. I recommend CHMS without reservation to groups and associations with similar needs.”

APPROACH AND METHODOLOGY

CHMS has worked with a number of organizations to deliver assistance and support through challenging transitions. We have utilized several operational models to ensure excellence and the continuity of services. Working with your leadership, CHMS will develop an operational model and timeline for the transition of services in each area of responsibility. We recognize that circumstances may change throughout the transitional period and are flexible and open to working within that change. CHMS is prepared at anytime to assume responsibilities immediately as the need arises over the next 18 months.

Upon completion of the transition, CHMS will provide full-service association management to SDS. The headquarters of the Society will be established at our offices in Albany, New York. A live receptionist will be available to answer all calls in the Society's name and forward them to the Executive Director who will respond to the calls or transfer them to the appropriate individual. The Executive Director will also reply directly to emails or letters received at an address that will be created for SDS. A talented team of association professionals will be available to assist SDS in areas such as financial management, event planning, and communications. CHMS provides all necessary office equipment, including computer hardware, software, telephone, fax, copier, video conferencing, and postage machine. A fax number is also provided. Conference rooms are available for your use at our Albany office. CHMS will store the most recent two years' records in our offices. We will arrange for the balance of your records to be archived at a safe and protected location. The cost will be billed directly to SDS.

CHMS provides full technology management for all association management clients. We manage websites and repositories for documents, implement online surveys, provide member email blasts, manage registration, process credit cards, and create and manage discussion forums for our clients. In daily operations, our association management and support staff utilize a wide variety of content management and association management systems to advance client missions and provide exceptional membership services. These systems allow the client to have the most up-to-date information available for its leadership and members through the website or online resource solutions.

CHMS professional staff is experienced in managing all functions of an organization. We will provide full administrative support to the President and/or designee to ensure that all tasks are achieved in a timely and effective manner.

Our financial staff utilizes QuickBooks Accountant Pro in servicing our client accounts. They also use an integrative approach with client websites in order to access online financial transaction information and downloads in order to ensure proper reconciliation of accounts.

CHMS PROFESSIONAL EXPERIENCE

Capitol Hill Management Services has developed significant expertise in all aspects of association management. We are pleased to provide our experience for your review.

Executive Director – CHMS provides Executive Director service to a variety of organizations. We offer an experienced and talented professional who reports directly to the President and/or Board of Directors and is responsible for carrying out all directives of the board. Utilizing his/her experience in association management, the Executive Director makes recommendations to the board regarding best practices in the association management industry, strategies for growth, future initiatives, and opportunities. As the main point-of-contact for the board, all association work is assigned to the Executive Director who has access to other members of the CHMS team for their expert assistance, thereby assuring that all work is completed in a timely manner. The Executive Director oversees all work and is responsible for the delivery of quality services to our association partners.

Our dedicated and talented association management staff includes experts in board and leadership development, strategic planning, financial management, event planning, communications, public relations, membership and database management, web technology, social media, publications, and design.

Administration – CHMS professional staff is experienced in handling all functions of an organization. We currently provide administrative support to organizations around the world. We continuously update our technology and review our policies, procedures, and operational systems in order to ensure the highest level of excellence and efficiency in our services.

Board of Directors Management– CHMS provides complete management of Board, Executive Committee, and taskforce meetings on behalf of our clients. This includes arranging the meeting location or conference call, preparing all documents, providing meeting notices, taking and preparing minutes, and participating to the extent desired by the Board. CHMS staff plans, produces, and participates in Board Retreats as required.

Membership Development and Retention – CHMS currently provides membership support to all of our association partners. This includes targeted membership attraction activities as well as consistent member retention strategies. CHMS has successfully assisted dozens of organizations to stabilize and grow their membership. Working with the SDS leadership, we will identify potential members, develop and implement a member attraction plan, and continuously monitor success. Through our experience, we recognize that our actions are most effective when they are focused, consistent, and clearly demonstrate the value of membership. We also have found that social media sites are often useful in the attraction of new members.

Meetings, Conferences, and Events – Well-attended events offer an opportunity for an association to enhance its reputation, build camaraderie, inform membership, and increase financial resources. CHMS has extensive experience working with hotels and meeting facilities around the country. We negotiate and organize successful conventions, conferences, annual meetings, trade shows, and regional symposiums for national, statewide, and regional clients.

CHMS produces over 200 successful client conventions, trade shows, conferences, symposia, scientific conferences, and other special events annually. We work with client planning committees to ensure that an event timeline, budget, and promotional plan are fully developed and implemented. We also assist in the development of all collateral materials for these events, including invitations and programs.

CHMS and our Certified Meeting Planners regularly negotiate with major convention centers, resorts, and hotels across the United States, leveraging our strength and experience to obtain the best packages for our clients.

Publication Support – CHMS works with a number of organizations that provide scholarly publications to members. We typically coordinate with a third-party publisher, providing administrative coordination and support. CHMS is also responsible for the in-house production of digital and print newsletters for the majority of our association partners.

Chapter Support – CHMS understands the importance of building and maintaining solid relationships with chapters of an organization and works to support those efforts. Working on behalf of our clients, we have assisted organizations in improving communications, coordinating efforts, and delivering joint events, webinars, trainings, and other mutually beneficial activities. CHMS works with many national, statewide, and international organizations to provide strategic, administrative, and financial management support to committees, chapters, and regional groups. Our staff is well-versed in the important functions of chapters, committees, and regional groups and the critical role the staff plays in working with them to leverage their time and expertise on behalf of the organization.

Webinars – Webinars have become one of the most popular methods of informing and educating members. Many organizations have chosen to do a periodic seminar series of related topics, while others are scheduling monthly or quarterly sessions on a variety of topics. Associations typically offer webinars as either a member benefit or a source of non-dues revenue for the organization.

CHMS has extensive experience planning and presenting webinars on behalf of our clients. A key feature of a webinar is its interactive elements. Participants can share audio, documents, and applications with other webinar attendees while a webinar host is conducting a lecture or informational session. Working with a number of different webinar service providers, CHMS has administered webinars for audiences as small as 10 attendees to as large as nearly 1,000. These webinars have included speakers and attendees located internationally, as well as speakers participating directly from our offices using our state-of-the-art equipment and have actively engaged attendees through the use of custom polls and surveys.

Financial Management – CHMS offers a level of accounting expertise not often available to non-profit organizations and associations at a cost-effective price. CHMS uses an online banking program which allows your Treasurer or President to retain complete authority and control over your finances while the day-to-day operations are performed by a skilled accounting team.

Led by an in-house Certified Public Accountant, CHMS Financial Management staff is also available to provide assistance in a number of important and strategic areas and to advise the SDS in all financial management issues. This support will assist your Board in making sound management decisions based on a solid understanding of the organization’s financial situation. CHMS currently provides Bookkeeping and Financial Management Services to 49 non-profit clients.

“If you can’t measure it, you can’t manage it.”

- Unknown

CHMS Financial Management Services offer a solution to the most common management letter items for association audits, internal controls and an organization’s ability to prepare its own financial statements and footnotes in accordance with Generally Accepted Accounting Principles. CHMS provides for the separation of duties and the professional knowledge required to prepare financial statements and footnotes, thereby addressing those concerns of independent auditors.

Sponsorships – CHMS works with the boards of directors of a variety of associations to identify and attract potential sponsors and exhibitors. We create a sponsorship program which outlines potential sponsors, methods of approach, materials, costs, follow-up activities, thank you letters, deliverables, and communications.



**A Complete Solution
with Proven Results.**

Sarah Rudgers-Tysz
Executive Director
Mediation Matters
Capital Region, NY

“ As Executive Director, I rely on CHMS for their outstanding executive level financial management services. Their expert assistance with budgeting, grant reporting, controls, and procedures has made CHMS a true partner in the success of our organization. ”

Marketing/Communications/Public Relations – Frequent and effective marketing and communications are essential to building a dynamic organization with committed members. CHMS uses a variety of methods to engage and inform association members. These include the maintenance and promotion of a dynamic user-friendly website, scheduled email blasts, member alerts, social media, and digital or print newsletters. CHMS develops a complete marketing plan for each organization designed to enhance visibility, increase membership and sponsorship support, and reinforce each organization’s message. In addition, we remain alert for and seek out earned media opportunities on behalf of our association partners.

Website

Recognizing that a robust web presence is an absolute necessity for any organization, CHMS staff continually works with a variety of web providers to maintain up-to-date knowledge of website design and capabilities. We are very attentive to web solutions that provide the highest level of service relative to economic investment. CHMS manages the websites of the majority of our clients, providing timely and informative content., and has developed significant expertise in utilizing a variety of web platforms.

Email Blasts

Email blasts can be an effective and timely method of communicating with members provided they are recognized as important and informative. CHMS can assist the association in providing timely email blasts using a format which allows your members to recognize the value of the information provided.

Member Alerts

CHMS can help to create a format for Member Alerts that differentiates itself from the scheduled email and signifies the importance of the communication.

Newsletters

CHMS is experienced in the design, preparation, and delivery of both digital and paper newsletters. We assist organizations’ editorial committees and newsletter publishers, as necessary, with assembling content, editing, formatting, and distributing the newsletter.

Social Media

Associations often utilize social media sites as a way to attract and communicate with members and prospective members. CHMS is experienced in establishing and administering up-to-date and interactive social media sites on behalf of dozens of clients. Our staff is skilled in the use of Facebook, Twitter, LinkedIn and other social media sites and utilizing these tools to benefit the organizations we serve.

CHMS staff is trained to utilize major web solutions and content management systems such as Avector, Constant Contact, Membee, MemberClicks, StarChapter, Cvent, and YourMembership.

Certification and Licensing – CHMS manages continuing education, certification, and professional licensing for a variety of professions. We administer certification testing for the National Federation of Licensed Practical Nurses Education Foundation, the Institute of Certified Records Managers, and the New York State Ophthalmic Dispensing License regulated through the New York State Department of Education. Since 1995, we have provided psychometric and administrative services to the Academy of Certified Archivists, an international organization which offers a certification examination throughout the world. We prepare and administer the New York State licensing exams for opticians and assist the California Chapter of the American Massage Therapy Association with both mandatory and voluntary Continuing Education Programs. Additionally, we worked with the Injured Workers’ Bar Association to meet the credentialing requirements of the organization and continue to manage their successful credentialing program. CHMS manages Continuing Education Programs in five professions on behalf of the Estate Planning Council of New York City: Accounting, Law, Banking, Insurance, and Financial Planning.

The vision of CHMS is to become a true partner in the success of our clients.

A Complete Solution with Proven Results.

“As an international organization looking to expand our reach and impact, we have found the expertise, experience and professionalism of CHMS invigorating for both our leadership and association’s operations. Through our partnership, we are strategically placing APTi on a path for success and growth..”

Maryanne DiMarzo
Past President
Association for Psychological
Type International



ASSOCIATION MANAGEMENT STRATEGIES FOR SUCCESS

With over three decades of experience in association management, CHMS has developed the policies, procedures, and operational and executive strategies to successfully support non-profit organizations and professional societies. We continuously work with organizations around the world, providing us a platform to observe upcoming challenges and emerging opportunities. This insider view of association management will assist us in securing the future of the SDS. Through our vast experience, CHMS has developed the following strategies for organizational success.

- Establish organizational and standard operating procedures and effectively serve members, boards of directors, committees, and sponsors.
- Provide consistent and valuable communication with members. Continually reinforce the value of being a member by providing relevant, accurate, reliable, and timely information.
- Seek out opportunities to increase member attraction activities by identifying potential parties, entities, etc. who would benefit from membership.
- Identify and evaluate opportunities to increase non-dues revenue.
- Create important partnerships and collaborations with related organizations, sponsors, and potential sponsors.
- Provide an up-to-date, interesting, active, and informative website that effectively and creatively represents the organization.
- Remain alert to, and capitalize on, opportunities for earned media on behalf of clients.
- Regularly and consistently promote membership, events, and services.
- Solicit feedback from members and listen/respond to the feedback.
- Develop new strategies to meet organizational challenges.
- Consistently demonstrate the value of being a member.

**A Complete Solution
with Proven Results.**

“ Switching to an association management company was a major concern for us, but CHMS worked very closely with SQA officers and Board to ensure a very smooth and seamless transition from our former business manager. The staff is very pleasant and responsive, communications are answered promptly, and event planning and logistics are effective. CHMS has played an important role in redesigning our website, facilitating strategic planning and improving our budgeting process. We are very happy with CHMS. ”

Indrani De
Past President
Society of
Quantitative Analysts



TECHNOLOGY

CHMS provides full technology management for all association management clients. We manage websites and repositories for documents, implement online surveys, provide member email blasts, manage registration, process credit cards, and create and manage discussion forums for our clients. Using a qualified and experienced third-party provider, we assist in the development and design of websites, but do not provide development and design services in-house.

CHMS staff is trained to utilize major web solutions and content management systems such as Avector, Constant Contact, Membee, MemberClicks, StarChapter, Cvent, and YourMembership.

In daily operations, our association management and support staff utilize a wide variety of content management and association management systems to advance client missions and provide exceptional membership services. These systems allow the client to have the most up-to-date information available for its leadership and members through the website or online resource solution. CHMS staff work collaboratively with the appropriate client leaders in producing new content and regularly audit online databases to ensure accuracy.

CHMS staff is adept at learning the proprietary management systems of our clients. We will develop expertise in the utilization of the SDS website, evaluate its effectiveness, and make recommendations to the Policy Council. Our team approach ensures that several members of our talented staff will become proficient in the use of the SDS web platform.

Our financial staff utilizes QuickBooks Accountant Pro in servicing our client accounts. They also use an integrative approach with client websites in order to access online financial transaction information and downloads in order to ensure proper reconciliation of accounts.

A Complete Solution with Proven Results.

“ We are a professional association with over 2,400 members. CHMS provides our association with the resources to help our board function like never before, including the support to create a strategic plan to guide our future, expert financial services and an executive director that is indispensable. ”

Linda Erskine-Bauer
CRNA
Past President
North Carolina Association
of Nurse Anesthetists
Cary, North Carolina



SCOPE OF SERVICES

CHMS recognizes that the scope of services will vary during the contract period. Upon completion of transition, CHMS will provide all services as requested by the System Dynamics Society.
(Please see Attachment A – Scope of Services)

REFERENCES

Client References

William Acker, PhD
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HeathwaiteE@pioneerbnking.com
www.pioneerbanking.com

TRANSITIONING

CHMS Client Transition Timeline

CHMS is experienced in providing seamless and efficient transitions. Below is an example of a typical transition process. However, as determined by the leadership of SDS, CHMS will immediately assume responsibilities and is prepared to do so at the pace required by the organization.

Steps	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Initial Transition Call & Begin Process	█							
Infrastructure Set-Up (Office, Finance, Mail, Email, Phone, Server Files, etc.)	█	█						
Transfer of Electronic Records & Databases; Website/Social Media	█	█						
Transfer of Hard Files & Property			█	█	█			
Notification of Stakeholders				█	█			
Major Events Overview & Planning			█	█	█	█	█	█
Committee Outreach & Follow-Ups				█	█			
Outreach to Leadership & Follow-Ups with Key Players	█	█	█	█	█	█	█	█
Transition Reviews by Leadership & CHMS				█				█
Other Transition Steps:								