

FEE STRUCTURE

CHMS does not provide services on an hourly or FTE basis. CHMS offers full-service management, ensuring that contracted services will be provided at a price agreed upon by both parties. Proposed annual fees are based on the requirements of each organization. We consider the responsibilities and experience level of the Executive Director, membership and budget size, number and size of meetings, publications and materials, promotional activities, membership activity, credentialing requirements, number of financial transactions, and staff time off-site.

PRICE PROPOSAL

Association Management Services

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

In addition, the Society shall reimburse CHMS for the nominal cost of miscellaneous office and travel expenses.

SUMMARY

CHMS is uniquely qualified to provide services to the System Dynamics Society. We recognize the potential disruption significant changes can cause and are experienced in providing assistance, support, and guidance throughout challenging transitions. We are flexible and open to a variety of operational systems. CHMS is prepared to assume responsibilities at any time and to provide support at the pace required by SDS.

With 35 years of experience, CHMS has developed expertise in all areas of association management. Our seasoned team of association management professionals will provide outstanding service to your members, Policy Council, and stakeholders. We offer an unmatched online financial management program which allows you to maintain full authority and control over your finances, while the day-to-day work is performed by a skilled accounting team. We successfully plan and produce over 200 meetings, conventions, tradeshow, and scientific conferences annually. We continuously explore new ways to utilize technology to enhance and refine services to members. Most importantly, we offer our unwavering commitment to achieving the goals and objectives of our association partners.

We look forward to the opportunity to meet with you to learn more about SDS and discuss how we may be of service to your organization.

Please contact:
John A. Graziano, Jr.
President
518.463.8644 Office
518.577.1710 Mobile
john@caphill.com

Thank you for your consideration of Capitol Hill Management Services.

APPENDIX A

CHMS Current Clients

International

- Academy of Certified Archivists
- Association for Psychological Type International
- Computer Science Teachers Association
- Controlled Environment Testing Association
- Institute of Certified Records Managers
- North American Drama Therapy Association
- Society of Quantitative Analysts
- New York State Adult Day Services Association
- New York State Chemistry Council
- New York State Council of Health-System Pharmacists
- New York State Dispute Resolution Association
- New York State Liquor Store Association
- New York State Society of Opticians
- New York Statewide Senior Action Council
- New York State Volunteer Ambulance and Rescue Association

National

- American Academy of Psychotherapists
- Association for Conflict Resolution
- Mental Health Foundation
- National Adult Day Services Association
- National Association of Extension 4-H Agents
- National Association of Patent Practitioners
- National Federation of Licensed Practical Nurses
- National Federation of Licensed Practical Nurses Education Foundation
- Sports, Cardiovascular, and Wellness Nutrition
- North Carolina Association of Nurse Anesthetists
- North Carolina Dental Society
- North Carolina Dietetic Association
- North Carolina Interpreters and Translators Licensing Board
- North Carolina Licensed Child Care Association
- North Carolina State Hearing Aid and Fitter Board

State

- American Massage Therapy Association – California Chapter
- Automotive Recyclers Association of New York
- Injured Workers Bar Association
- Mediation Matters
- New York Alliance Against Insurance Fraud
- New York Aviation Management Association
- New York Anti Car Theft & Fraud Association
- New York Association of County Health Officials
- New York Battery & Energy Storage Technology Consortium
- New York Health Information Managers Association
- New York State Academy of Nutrition and Dietetics

- South Carolina Society of Health-Systems Pharmacists
- United New York Ambulance Network

Regional

- Albany Executives Association
- American Institute of Architects – Eastern New York Chapter
- Capital Region Building Owners & Managers Association
- Capital Region Human Resources Association
- Estate Planning Council of New York City
- Financial Planning Association of the Triangle

APPENDIX B

Capitol Hill Management Services Executive Team



**President,
John A. Graziano, Jr.**

Mr. Graziano is an entrepreneur and successful businessman. He began working with nonprofit organizations when he was just a teenager and quickly learned the keys to successful non-profit management. He is credited with helping several organizations to reinvent themselves for survival. Mr. Graziano has developed a unique association management organization which uses experience and tradition, technology, market awareness, and quality employees to assist organizations in achieving success.



**Executive Vice President,
Denise Sheehan**

Ms. Sheehan is an experienced leader in both government and non-profit organizations. Prior to joining CHMS, she successfully led the international non-profit organization, The Climate Registry, and was responsible for managing the organization's \$2.5 million budget, as well as ensuring the organization's success in a challenging economic environment. Ms. Sheehan also has 20 years experience in New York State government. She previously served for ten years in senior management positions at the New York State Department of Environmental Conservation, including two years as Commissioner. Ms. Sheehan also served for ten years at the NYS Division of the Budget and she has served on several public authority and non-profit Boards.



**Vice President for Finance and Operations,
Ralph Bizzarro**

Mr. Bizzarro currently serves as Vice President for Finance and Operations at CHMS. A Certified Public Accountant, Mr. Bizzarro leads our North Carolina Office and oversees all of the financial activities involving CHMS association, non-profit, and business clients, as well as the firm's infrastructure and information technology operations. Mr. Bizzarro has two decades of extensive experience in a wide variety of financial settings. At CHMS, Mr. Bizzarro's responsibilities include supervising the accounting and information technology functions of the company, as well as supervising the firm's Financial Services Division. In this role, his responsibilities include financial analysis, budgeting, developing and monitoring accounting policies, grant financial management and reporting for associations and not for profit clients. He provides daily oversight of the accounting function for all clients and the firm's internal accounting function. Mr. Bizzarro also supervises monthly and year end closing processes for clients as well as the firm's internal financial system.

APPENDIX B

Capitol Hill Management Services Executive Team - Continued



Vice President for Association Management, Jim Thompson, IOM, CAE

Mr. Thompson serves as Vice President of Association Management for CHMS's Southern Region where he directly oversees the day-to-day activities of the association management team in our Raleigh, North Carolina offices. Mr. Thompson is a Certified Association Executive with more than 14 years of experience in the field. He most recently served for nine years as the Executive Director of the Association Executives of North Carolina where he successfully increased AENC's membership from 400 members to nearly 750 members during his tenure. Mr. Thompson previously served for five years as the Director of Business Development for the North Carolina Association of Realtors.



Director of Association and Non-Profit Development, Thomas Coté, MBA, CAE

Mr. Coté serves as Director of Association and Non-Profit Development, bringing his vast experience in all facets of association and non-profit management to our clients. Serving in an advisory capacity, Mr. Coté offers his unique expertise in problem solving, best practices, and strategic development to assist clients in achieving optimal performance. Mr. Coté is a graduate of the Empire State Society of Association (ESSAE) Executives Association Leadership Academy and was named the ESSAE Rising Star Award winner in 2012. Mr. Coté has been a speaker and panelist on association management topics, such as strengthening relationships between national and affiliated organizations and has been an invited speaker nationally and internationally on leadership and inter-generational motivation.



Director of Meetings and Events, Donna Johnson, CMP, CMM

Ms. Johnson is a Certified Meeting Planner with demonstrated success in the planning and execution of meetings, tradeshows, conferences, and events. Ms. Johnson assists with site selection, negotiates contracts, manages budgets, develops programs, manages exhibitions, and provides complete oversight of all aspects of meeting planning and production. Ms. Johnson is a Certified Meeting Professional and in 2007, received her Certification in Meeting Management, which is the premiere designation achieved by experienced and highly accomplished members of the global meeting industry community, showing the business standard of excellence for meeting professionals.

APPENDIX C

Privacy Policy

Capitol Hill Management Services recognizes that in performing services for its clients, CHMS may handle client information that is sensitive and/or confidential in nature. CHMS values our clients and maintaining the confidentiality of the information they share with us. As such, CHMS adopts the following policy and requires all CHMS employees to adhere to this policy.

CHMS will maintain in trust and confidence the confidential information disclosed to us by our clients, and will not use such information for our own use or for any purpose except solely to carry out CHMS's responsibilities to our clients.

CHMS will not disclose any confidential information to third parties except as authorized by our clients.

CHMS will take all reasonable measures to protect the secrecy of and avoid disclosure or use of confidential information in order to prevent it from falling into the public domain or the possession of persons or organizations other than those persons or organizations authorized by our clients.

CHMS will not sell, trade or otherwise transfer to outside parties, for any reason except as authorized by our clients, confidential information received by our clients.

CHMS will abide by any and all federal, state and local laws or regulations governing the treatment of information we receive from our clients that may be subject to additional requirements or conditions.

CHMS employees violating this policy may be subject to disciplinary charges and/or legal action.



System Dynamics Society Scope of Services

Capitol Hill Management Services (CHMS) is pleased to provide this proposed scope of services to the System Dynamics Society (Society). As a full service association management firm with more than 35 years of experience assisting non-profit organizations and associations, we have the expertise and management systems in place to assist the Society and ensure that it remains a robust and relevant organization into the future.

Executive Director

CHMS professional staff is experienced in providing Executive Director services to a variety of non-profit and trade organizations located throughout the world. Our team is well-versed on non-profit governance, Board management, strategic planning, financial management, membership, publications, communications, event planning and management and chapter relations.

CHMS is able to offer the Society different options for providing an Executive Director. These options include:

- 1. CHMS will work with the Society's leadership to conduct a search for an Executive Director for the Society. Once selected, the Executive Director could either serve as an employee of the Society or as an employee of CHMS.**
- 2. CHMS will provide an experienced and talented professional from among our staff to serve as the Society's Executive Director.**

The Executive Director will report directly to the President and/or Board of Directors (we herein note that for the Society, the governing Board is referred to as, "The Policy Council") and is responsible for carrying out all directives of the Council. Utilizing his/her experience in association management, the Executive Director will make recommendations to the Council regarding best practices in the association management industry, strategies for growth, future initiatives, and opportunities. As the main point-of-contact for the Council, all association work will be assigned to the Executive Director who will have access to, and

coordinate with, other members of the CHMS team for their expert assistance, thereby assuring that all work is completed in a timely manner. The Executive Director will oversee all work products and will be responsible for the delivery of quality services to the Society.

Working with the support of the CHMS Management Team, the Executive Director will provide the following services:

- 1) Reporting to the Administrative Committee and the Policy Council, the Executive Director will manage the Society Office, including planning and directing all aspects of the Society operations and all phases of the Society's diverse activities.
- 2) Be responsible for direction and coordination of all Society home office activities.
 - a. Prepare and submit various management reports.
 - b. Oversee purchasing and inventory of products.
- 3) Serve as a referral and networking person for issues related to the field of System Dynamics.
- 4) Conduct special projects and assignments.
- 5) Ensure compliance with relevant state and federal laws governing non-profit organizations
- 6) Oversee membership and services to members and other interested parties, including:
 - a. Assist in developing strategies to make membership more valuable, including benefits for Chapters and Special Interest Groups.
 - b. Oversee the renewal and new member campaigns.
 - c. Resolve any membership problems.
 - d. Work closely with the Society's publisher for member services.
 - e. Implement emeritus membership program.
- 7) Support all officers of the Policy Council; confer with the President, VPs for Finance, Meetings, Membership, Chapters Activities, Marketing and Professional Practice for planning and growth, directing and coordination of programs and changes in procedure and policy.
 - a. Work with the President each year to update "Presidential Duties" document.
 - b. Work with the President, Secretary and VP Electronic Presence to organize Policy Council meetings.
 - c. Work with President and VP E-Presence for electronic meetings when necessary
 - d. Oversee management of creating and archiving minutes.
 - e. Serve on standing and ad hoc committees as appointed.
- 8) Manage campaigns for growth: Sponsorship (Society and Conference), Membership, Chapter and Special Interest Group, Volunteer, Awards Endowment, etc.
- 9) Attend all Policy Council meeting and present biannual status reports.
- 10) Attend all Administrative Committee meetings.
- 11) Maintain good working relationship with publisher regarding research journal and subscriptions for members.
 - a. Attend annual meeting with publisher and Executive Editor and/or VP Publications, take notes and follow up on any initiatives.
 - b. Assist with contract negotiations; keep abreast of other publishing offers.

- 12) Working with VP Electronic Presence and appropriate support staff, assist in web development and presence. Provide analysis; assist in definition and direction of computer-related development and maintenance activities.
 - a. Ensure correct functionality of all Society websites. Resolve any web related problems.
 - b. Work closely with VP E-Presence.
 - c. Document systems for maintenance after programming.
- 13) Attend national and international System Dynamics events to represent Society.
 - a. Work to “trade” conference sponsorship with other organizations.
 - b. Find new conferences or other non-profits to trade sponsorships.
 - c. Monitor conference venue default sites program.
- 14) Coordinate with CHMS team staff members as well as with student interns, volunteers, and others, including independent contractors and consultants who work with the Society.
- 15) Attend training and classes to learn more about the field of System Dynamics and/or maintaining a non-profit organization.
- 16) As required for grants or other contractual obligations, maintain time record accounting system for Society-related activities.
- 17) Provide support to System Dynamics initiatives, including:
 - a. Information management for correspondence, proposals, contracts, etc.
 - b. Attend meetings and conferences when necessary.
 - c. Supervise and/or coordinate with researchers, students, and others who work to support these initiatives.
- 18) Secure funding sources to subsidize Society initiatives, including:
 - a. Develop contacts made through System Dynamics Society and Society member organizations.
 - b. Develop fund raising strategies and oversee all aspects of fundraising programs; create goals and solicit funds to meet those goals.
 - c. Develop new products for the Society to sell in order to maintain an appropriate income.
- 19) Working with expert staff at CHMS, provide guidance, advice and assistance to the Policy Council regarding organizational governance, including best practices for non-profit by-laws, policies and procedures
- 20) Work with the Policy Council to review the Society’s strategic plan and engage the Council in a process to review the strategic plan and annual workplan.
- 21) Explore opportunities to develop new professional standards and a credentialing system for systems dynamics.

Administrative Support

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.

CHMS will provide the following services:

- 1) Establish the Society's headquarters at CHMS Offices located 230 Washington Ave. Extension, Albany, NY.
- 2) Establish a phone line for the Society and provide a live receptionist to answer the phone in the Society's name from 9:00 AM-4:30 PM.
- 3) Provide executive office space for Executive Director with access to CHMS meeting rooms, training room and administrative staff.
- 4) Provide administrative and technical support to the Executive Director.
- 5) Support submission of compliance reports to NYS and other governmental bodies.
- 6) Oversee work of graduate assistants and/or student interns working on special or long-term projects.
- 7) Maintain and update the Society's pages for the System Dynamics Review pages.
- 8) Manage supplies, equipment purchase(s), computer software and inventory.
- 9) Manage equipment and computer software inventory.
- 10) Coordinate purchase and installation of any new computing equipment
- 11) Create presentations, gather data and information for reports and create databases as necessary to track critical information for a variety of projects
- 12) Facilitate Product Distribution Game (Beer Game) events as needed; become proficient in details of running the "Beer Game"
- 13) Manage and update Policy Council Forum lists and other Listservs under the Society's umbrella.
- 14) Coordinate dispersal of Society products, advertising and marketing materials.
- 15) Maintain and update insurance payments and records.
- 16) Make travel arrangements for Executive Director.
- 17) Arrange conference calls and face-to-face meetings as needed.
- 18) Maintain manuals for database tasks, online submission system tasks, sales and shipping.
- 19) Order office supplies and maintain stock of letterhead, etc.
- 20) Coordinate Policy Committee meeting details and logistics and communicate with invitees regarding attendance and logistical information.
- 21) Provide support for electronic meetings and voting by the Policy Council, including submission of VP reports to the bi-annual meetings.

Membership Management

CHMS currently provides membership support to all 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 Society's 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 an effective communications strategy using social media is often useful in the attraction of younger or more technology-inclined individuals.

CHMS will provide the following services:

- 1) Maintain and upgrade membership database to provide all information for renewal solicitation of 1000+ members.
- 2) Create and implement calendar for renewal solicitations, including soliciting correspondence to members from Policy Council members and drafting renewal solicitations.
- 3) Process new and renewal membership applications.
- 4) Manage accounts receivable and provide receipts and invoices for new and renewal memberships.
- 5) Generate contacts with potential new members and systematically contact non-renewals.
- 6) Make first contact with new members.
- 7) Perform analysis of membership numbers to determine renewal rate, retention rate, etc.
- 8) Coordinate sharing of membership list with journal publisher.
- 9) Respond promptly to member inquiries and issues by telephone, fax, email, and mail.

Database Management

CHMS staff is experienced in utilizing different databases, major web solutions and content management systems such as Filemaker, Avectra, Constant Contact, Membee, MemberClicks, StarChapter, CiviCRM, Cvent, and YourMembership as well as proprietary programs developed for our clients.

CHMS will provide the following services:

- 1) Maintain and further develop the Society's Access database to respond to changing information management needs, specifically coordination with online conference paper submission and reviews, increase in required data on membership, conference registration, sponsorship solicitation, sales contacts, and mailing list.
- 2) Work with VP Electronic Presence to modernize and upgrade interactions between Access Database and the Society's web portal, including possibly shifting away from Access.
- 3) Use the database to produce targeted mailings and contact lists focused on membership renewal, payment of member fees, supported or free memberships, permissions to add to publisher's mailing lists, permissions to include in the online directory, volunteer service, sponsorship solicitation, contact with sponsors, publication of sponsor names, solicitation of conference reviewers, conference reviewer preferences, conference registration, conference registrant meal and room arrangements, payment of conference fees, and other information needs.
- 4) Facilitate the efficient export of data to the journal publisher, to the online directory, to the conference submission and review system, and for use in publications such as the online conference proceedings.

- 5) Continue to expand database functionality and integration with added data from sponsors/donors.

Financial Management

CHMS Financial Management Services offer a level of accounting expertise not often available to non-profit organizations and associations at a cost-effective price. Our quality online bookkeeping services provide timely and accurate information to our clients while the organization's leadership retains full authority and control of its finances. In addition to providing day-to-day bookkeeping operations for the Society, CHMS in-house Certified Public Accountant, Ralph Bizzarro, and his professional staff will be available to the VP of Finance and the Council to provide assistance in a number of important and strategic areas and to advise in all financial management issues. CHMS will assist in evaluating the projected financial impact of new program opportunities and provide strategic analysis of the organization's finances, enabling the Society to make sound management decisions based on a solid understanding of the organization's financial situation.

CHMS will provide the following services:

CHMS will oversee financial functions of the Society, including: accounting, budgeting, contracting, purchasing, taxes, and insurance issues. We will oversee management of computerized bookkeeping for the System Dynamics Society and the System Dynamics Group. During the transition, CHMS will work with the Society's CPA to ensure a seamless transition in the Society's finances. We will also assist the Society in providing any reports needs for the University at Albany. On an on-going basis, CHMS will:

- 1) Ensure accurate and complete financial records.
- 2) Prepare and submit various monthly financial reports in a timely manner.
- 3) Assist in development of budgets and monitor all budgets.
- 4) Initiate and assist in development of investment plans as needed.
- 5) Assist Executive Director and VP Finance to develop the Society's annual operating budget and related IFR account budget. Work with IFR Accounts will cease once the full transition is complete.
- 6) Assist Executive Director and VP Finance monitoring the Society's annual operating budgets and finances for all funding sources (the IFR and the Society's non-profit accounts).
- 7) Coordinate with Executive Director, VP Finance to ensure proper annual reports and filings compliance.
- 8) Secure an outside auditor to complete annual audit.
- 9) Assist with annual contract requirements (from draft through final execution of contract, amendments or updates) between Society and contractual partners.
- 10) Enter and classify all income and expense transactions using QuickBooks for tracking IFR account balance and all related accounting activities including IFR reconciliation.
- 11) Assist in preparation of IFR Spending Plan.
- 12) Assist with procurement and travel certifications and filings.

- 13) Assist with tracking and funding investment vehicles and funding.
- 14) Assist Executive Director with all Human Resources related activities.
- 15) Enter and classify all sales transactions using QuickBooks.
- 16) Produce receipts and invoices, record payments, enter credits, refunds, etc.
- 17) Process credit card slips and checks.
- 18) Enter and classify all sales transactions using QuickBooks.
- 19) Produce receipts and invoices, record payments, enter credits, refunds, etc.
- 20) Process credit card slips and checks.
- 21) Initiate and oversee external audits and process controls sufficient for external review by the policy council, IRS and other external bodies.
- 22) Work with the Investment Sub-Committee of the Administrative Committee to design and implement investment strategies for the Society's capital reserve funds.

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 will provide the following services:

Conference and Event Management Services

- 1) Manage and attend annual International System Dynamics Conference and provide pre-, during, and post- conference support including site visits and selection, budgeting, program assistance, web presence, coordinating volunteer labor and local arrangements. Includes writing and editing a variety of conference related literature for distribution; plan, coordinate and implement all events; assist and/or perform initial contract negotiations and vendor service agreements. (Domestic and International)
 - a) Track all finances.
 1. Create conference budget working with VP Meetings and local site.
 2. Analyze budgeted expenses against final totals.
 3. Create system for international bookkeeping when needed.
 - b) Suggest and create methods of improving the planning process and implementation of conferences.
 - c) Work with newly appointed program chair and conference chair each year.

- d) Monitor web submission system through all phases of submission and review, using it to create the program.
 - e) Work with software designer to improve the submission system.
 - f) Address the conference population, present reports.
 - g) Represent the Society.
 - h) Work closely with the Program chair and thread chairs in the development of the scientific program for the conference.
 - i) Staff and work on a post-conference review of each annual conference
- 2) Participate in pre-planning for 2017 Cambridge, Massachusetts conference.
 - 3) Negotiate conference venue for 2018.
 - 4) Create new events at conference to facilitate job-related conversations.
 - 5) Coordinate meeting details and logistics.
 - 6) Communicate with invitees regarding attendance and logistical information.
 - 7) Coordinate site selection activities well in advance of each annual conference.

Conference Submissions Management

Receive submission information electronically from the Society's online system and incorporate it for use in print and electronic publications. This also includes:

- 1) Track submissions through review and assignment to sessions, and carry out notification to authors.
- 2) Prepare abstracts and author information for publication in the online conference proceedings.
- 3) Communicate directly with and assist submitters, especially as relates to visa requirements.
- 4) Make corrections as needed in conference submissions.
- 5) Oversee review assignment completion and follow-up.
- 6) Solve problems and troubleshoot for authors and system users.
- 7) Communicate and coordinate with VP E-Presence to trouble shoot and maintain the submission system.
- 8) Support development of final conference proceedings as an online archival record of the Society's scientific program.
- 9) Support final updating of submitted papers before the final conferences proceedings go online.

Conference Correspondence Management

- 1) Create and implement calendar for communications with thread chairs, including drafting and sending letters.
- 2) Create and implement calendar for communications with reviewers, including drafting and sending letters.
- 3) Draft and send out monthly communications to database regarding conference updates.
- 4) Provide letters of attendance for attendees who need them.

Conference Volunteer Coordination

- 1) Work closely with the local conference host in all matters relating to conference volunteers, especially student volunteers.
- 2) Recruit, schedule and manage registration desk volunteers.
- 3) Recruit, schedule and manage satchel stuffing volunteers.
- 4) Manage communications with and registration of conference volunteers.
- 5) Work with the Awards Committee to assure timely and coordinated awarding of the annual Jay Forrester Award, the Dana Meadows Award, and other awards that are to be made at the annual research conference.

Conference Registration Management

- 1) Manage accounts receivable and provide receipts and invoices for approximately 500 annual conference attendees.
- 2) Produce all registrant-specific materials for conference: name badges, receipts, information packets, etc.
- 3) Perform analysis of registration numbers to determine participation rate, expected final attendance, etc.
- 4) Respond to potential attendees by email, fax, telephone, and mail.
- 5) Assist conference attendees with obtaining visas and contacting roommates.
- 6) Oversee communications to scholarship recipients.
- 7) Manage visa-denied author information for proceedings.

Publications, Sales, and Related Products

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.

CHMS will provide the following services:

- 1) Collaborate on design, editing and production of a variety of Society and conference materials — brochures, newsletters, registration forms, announcements, proceedings, etc.
- 2) Maintain inventory of games and other products that the Society sells.
- 3) Support order fulfillment for sales of publications, games and other products
- 4) Work with Executive Director in the development of new products for sale.
- 5) Collaborate on production and content of Annual Home Office, Executive Director's, and VP Finance Reports.
- 6) Assist with order fulfillment of products and publications as needed.

- 7) Work with publishers and manufacturing companies for final publications and products including annual conference proceedings.
- 8) Work with Wiley, publisher of printed and online quarterly journal, for up-to-date accuracy of Society pages and online information.
- 9) Provide desktop publishing capabilities in order to support various Society publication activities.
- 10) Collaborate on design, editing and production of society materials: brochures, newsletters, new member letters, letterhead, web pages, etc.
- 11) Review and update existing web pages for accuracy, completeness, and consistency.

Communications

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.

CHMS is also experienced in establishing and administering up-to-date and interactive social media programs on behalf of dozens of clients. Our staff is skilled in the use of Facebook, Twitter, LinkedIn and other social media outlets and utilizing these tools to benefit the organizations we serve.

CHMS will provide the following services:

Public Relations

- 1) Organize public relations campaign to maintain good will towards the Society create new relationships, and increase presence around the world. Includes generating up to four issues yearly of the *System Dynamics Newsletter* in collaboration with the current President, mass emailing, etc. Review all marketing and other literature. Evaluate campaigns and modify as well as create new initiatives.
- 2) Organize continuous informative and community-minded communications through use of mailings, publications, meetings – electronic and hard-copy.
- 3) Support the Society's *SD Forum*, an electronic online discussion site.

Web Authoring and Maintenance

- 1) Manage conference web information and archiving.
- 2) Create and update online proceedings and all ancillary activities.

- 3) Ongoing review of existing web pages for accuracy, currency, completeness, and consistency — edit and update web files.
- 4) Assist with e-mail and web pages for Chapters and SIGs.
- 5) Work with VP Electronic Presence and VP Marketing and Publications to review and update Society's web presence.
- 6) Work with VP Electronic Presence to more carefully and fully integrate the Society's web portal with its "back end" Access database.

Social Media

- 1) Review the Society's existing social media channels and prepare a strategy to increase the impact of the Society's social media messaging.
- 2) Maintain and update Society Facebook page.
- 3) Maintain and update Society Twitter account.
- 4) Create additional social media presence as needed.

Chapter Relations

CHMS is experienced in working with national and international organizations with chapters and/or special interest groups. We are similarly experienced in directly managing state and local chapters of larger organizations. This experience provides our team of professionals with a unique understanding of the important relationship between organizations and their chapters to ensure the success of both the parent organizations and their chapters.

CHMS will provide the following:

- 1) Work with VP Membership and Chapters to continually evaluate and update Society policies and procedures with respect to special interest groups and chapters.
- 2) Evaluate the current relationship between the Society and the chapters to assess the value proposition and offered through the chapters and to the Society.
- 3) Based on our assessment, develop strategies to strengthen the relationship with the Chapters, make membership more valuable for Chapters and Special Interest Groups.
- 4) Provide Chapter/SIG assistance, including:
 - a. updating Chapter/SIG leadership lists, maintaining contact with liaisons
 - b. managing Chapter/SIG meetings and related events at conference
- 5) Assist with e-mail and web pages for Chapters and SIGs
- 6) Work with VP Chapters, VP Membership, and VP Finance to administer the annual Field Development Fund, making annual awards that meet the fund's objectives.