

Prepared for the
possibilities



AITP Board Presentation

June 7, 2002

SMITH, BUCKLIN &
ASSOCIATES, INC.

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About Smith, Bucklin

Our Mission

Smith, Bucklin leads organizations to succeed by being the premier provider of strategic professional services

Smith, Bucklin & Associates

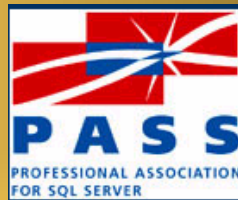
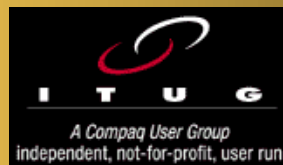
- Washington and Chicago core offices
- Nearly 700 employees
- 81 full-service clients worldwide
- 50% of clients for more than 10 years
- Over 1,000 meetings managed each year
- Over 55 Web sites managed

Technology Association Experience

- Unmatched experience and working knowledge of technology organization management:
 - Professional societies
 - User organizations
 - Membership organizations
 - Consortia
 - Conferences and events
 - Vendors, sponsors and exhibitors
 - Program and education development

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What Smith, Bucklin Brings to AITP

Leadership

- Thought leadership in the association management business
- Proven ability to optimize volunteer time
- Team of professionals who can build a strong partnership with the board of directors and constituents
- Implementation skills to bring reality to the visions of the key volunteers
- Executive director focus
- Ongoing staff development

Expertise

- Single focus on providing expert professional management services to nonprofit organizations
- Specialists with deep nonprofit experience in governance, facilitation, conferences, marketing and communication, financial management and Web site development
- Access to electronic repository of best practices gleaned from hundreds of association professionals
- Ability to attract and retain high quality personnel because of strong career path

Cost Effectiveness

- Access to state of the art infrastructure without capital expenditures
- Purchasing power and 3rd party contract leverage
- Lower headcount than standalone model
- Meet organizational needs by matching skill sets with appropriate tasks
- Stable, predictable costs with contractual obligation to adhere to budget
- Budgeting and forecasting accounting tools at the project level with CPA oversight

Shared Resources

- High caliber executive director at a fraction of total cost
- Access to specialists on as needed basis
- Flexible staffing model to quickly ramp up and down during peak needs
- Liabilities and risk for HR issues, rising medical costs, retirement plans, employee training and compensation/contractual issues are responsibility of Smith, Bucklin

Security

- Financial stability
- Access to resources
- Organizational security

Benefit Summary



Smith, Bucklin Scope of Service

AITP Services Overview

Executive Director	<ul style="list-style-type: none"> • Executive leadership
Administrative Services	<ul style="list-style-type: none"> • Membership processing • Records management • Board support • Chapter relations • Budget planning • General administrative support
Headquarter Services	<ul style="list-style-type: none"> • Professional office space • Business infrastructure (HR, Mailroom, etc.)

Marketing & Communications	<ul style="list-style-type: none"> • Member communication (<i>Information Executive and Nanosecond</i>) • Media relations
Conference Management	<ul style="list-style-type: none"> • Conference registration services
Financial Management	<ul style="list-style-type: none"> • Accounting services

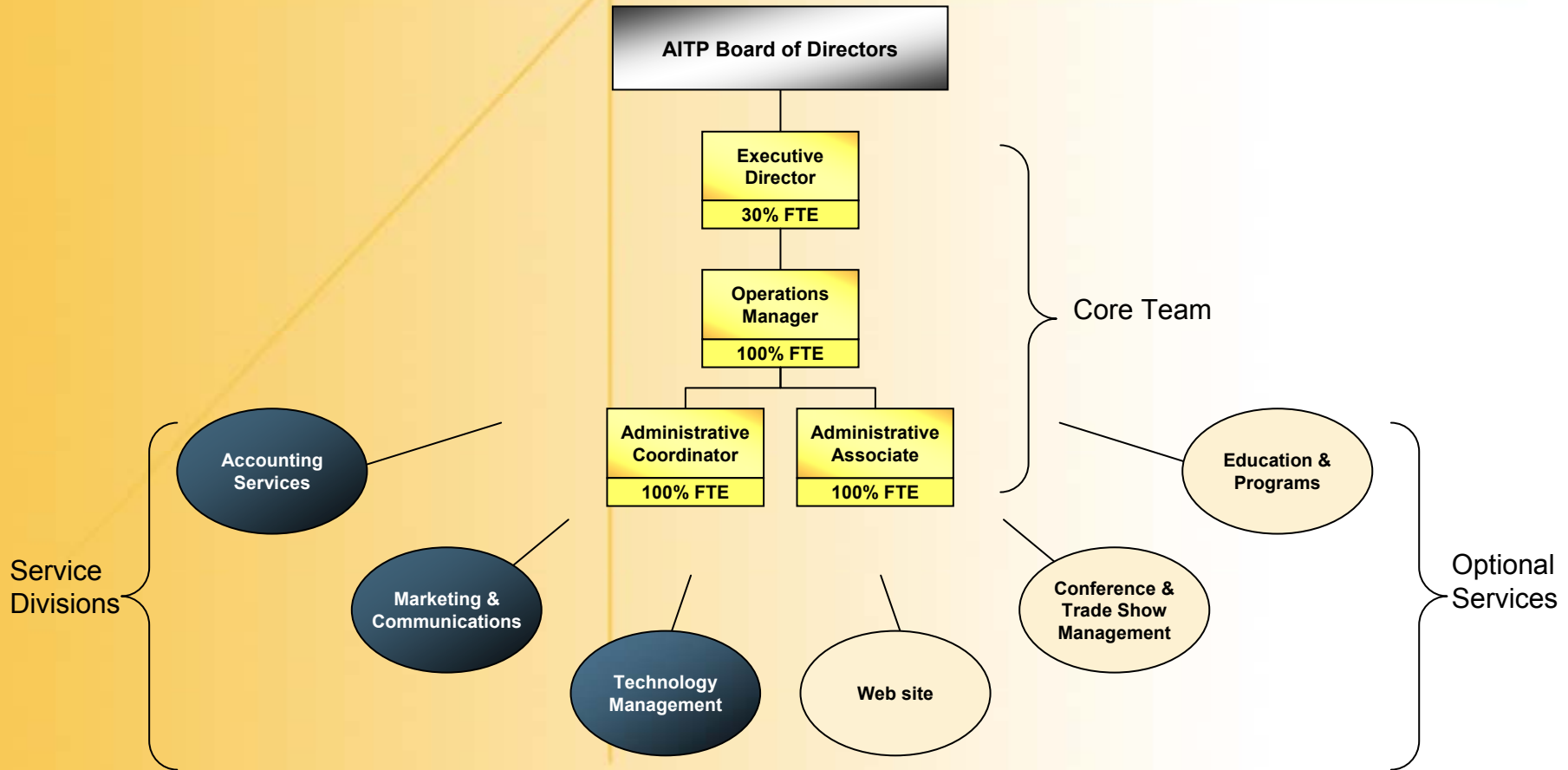
Services to be Considered

- Conference planning & management
- Education & programs development
- Conference marketing
- Conference sponsorship & exhibit development
- Publication advertising sales
- Document & publish Board minutes (5 meetings)

Services Available to AITP



AITP Staff Model



AITP Executive Director



Mary Ellyn Zola

- 8 years association management experience
- Executive Director of the International Commerce One Network (ICON) user group and Joint Users of Siemens Technologies - United States (JUST-US)
- Experience leading volunteer associations with member organizations that use AS/400-based ERP solution software or IBM technology
- Led Infinium UserNet, and the Acacia North American Users Group (ANAUG) as Executive Director

Pricing Model

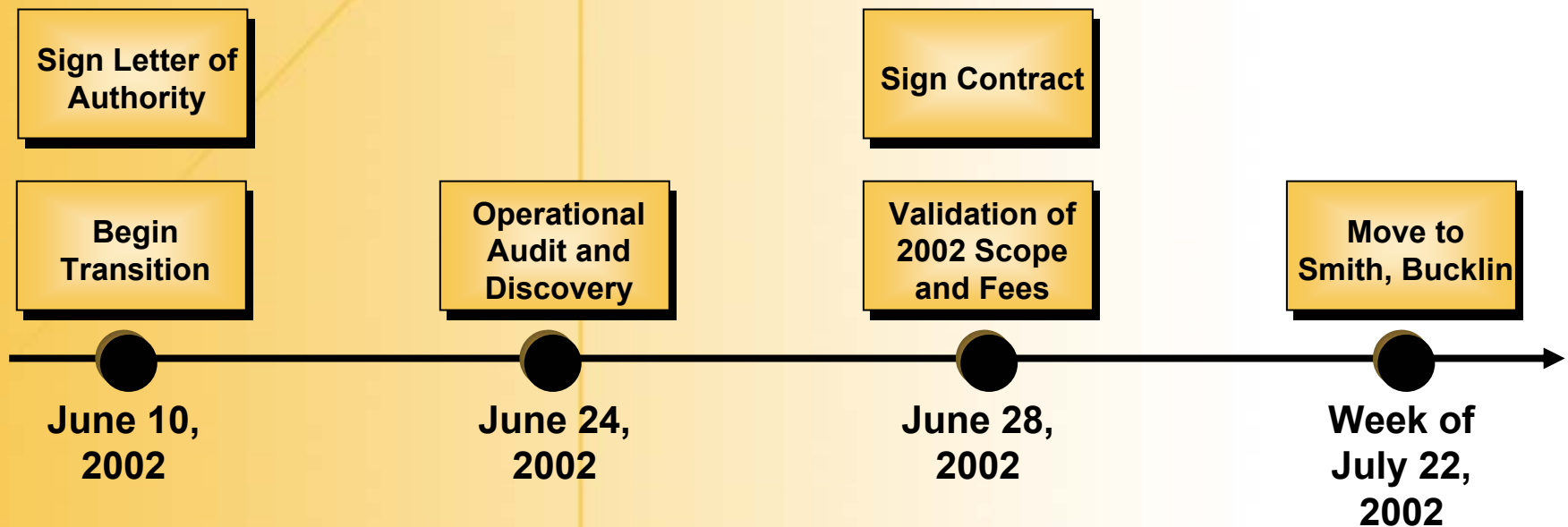
Fixed Fees	Variable Fees	Out-of-Pocket
Executive Director, Financial Management and Database	Staff Time	As used

Smith, Bucklin Financial Practices

- The AITP executive board is in **complete control** of resources utilization
- Smith, Bucklin provides **full-disclosure** on all Smith, Bucklin charges
- Smith, Bucklin is **contractually obligated** to manage to the budget and scope of services approved by the AITP Board

Next Steps

Next Steps





**Smith, Bucklin is prepared for
the possibilities**

Thank you for the opportunity.

Extra Slides

Headquarters Services

- Professional offices with Michigan Avenue address
- AITP listed in building directory
- Dedicated phone numbers
- Access to state-of-the-art office infrastructure: copiers, faxes and printers
- Full-service mail room
- Human Resources function
- Board meeting rooms available in Chicago & Washington DC
- Space for AITP memorabilia

Administrative Support

- Membership processing
- Records management
- Board support
- Ballot preparation, collection & counting
- Annual Meeting brochure support
- Chapter relations
- Budget planning
- Audit support
- General administrative support

Accounting and Financial Management

- Sophisticated accounting systems
- Customized chart of accounts
- Seasoned association accounting professionals including CPAs
- Detailed financial statements (including comparison to budget)
- Analysis of balance sheet accounts
- Transaction processing (credit card, Accounts Payable, etc.)
- Coordinate distribution of 1099s
- Bank statement reconciliation
- Quarterly forecasting
- Internal reviews & external audit support

Marketing and Communications

- Write, edit & produce six issues per year of Information Executive
- Write, edit & produce 2 issues per year of Nanosecond
- Maintain an AITP media list
- Prepare one press release on organizational news, accomplishments or projects for distribution

Conference Services

- Registration processing support for the Collegiate & ISECON Conferences

Services to be Considered

- Conference planning & management
- Education & programs development
- Conference marketing
- Conference sponsorship & exhibit development
- Publication advertising sales
- Document & publish Board minutes (5 meetings)
- Prepare quarterly cash flow analysis