



Core Capabilities

General Services

- Physical office to accept letters and deliveries (though in New Jersey, we do have a Philadelphia mailing address)
- Front line customer service over phone, email and social media
- Production of mailings and fulfillment of customer orders

Financial Services

- Full charge accounting
- Contract negotiation and review
- Management of accounts include A/R and A/P functions
- Oversee preparation of monthly statements, along with annual filings and tax returns
- Review of financial policies and procedures in line with established best practices

Fundraising Services

- Development and implementation of annual giving and corporate support programs
- Oversight of grant development efforts
- Support in meeting state level requirements for charitable registration

Governance Services

- Management of board operations
- Participation in governance meetings, acting as secretary if requested
- Creating reference materials and conducting training and onboarding as appropriate

Marketing Services

- Development of annual strategic marketing campaign
- Managing a coordinated social media presence to drive business goals
- Implementation, and post campaign evaluation, of print and electronic marketing initiatives

Meeting Services

- Site selection and contract negotiation
- Logistical program development
- Onsite management and general support (logistical, registration desks, etc.)
- Vendor coordination and financial reconciliation

Membership Services

- Development of annual strategic membership campaign
- Implementation, and post campaign evaluation, of all acquisition and retention efforts
- Review, and recommendations with regard to dues levels and member benefits