

New ASPAN National Support Services



The following grid outlines the list of services that will be provided by ASPAN National to all Regions as benefits of affiliation, as well as optional services that may be provided for an additional fee.

| Services Included with Affiliation | Optional Services (fee-based) |
|--|-------------------------------|
| General Support Services | |
| <ul style="list-style-type: none"> • Short-term legal and consulting services to support the reorganization process • Regional staff liaison (1 FTE) • Other skill-based FTEs or contractors/consultants to support new services | N/A |
| Governance | |
| <ul style="list-style-type: none"> • Sample mission, vision, core values • Best practice manual (board member, officer, committee roles and responsibilities, document retention etc.) • Board governance/fiduciary training (periodic webinars, written materials) • New board member onboarding materials • Sample bylaws, Sample committee charters, board meeting packets (agenda, reports, etc.), board assessment materials, meeting minutes • Sample 990 policies (whistleblower, conflict of interest, document retention and destruction, etc.) • Sample board expectations, nominations process | N/A |

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|--|--|
| Finance | |
| <ul style="list-style-type: none"> • Regional/national dues administration • Recommended budgeting process • Sample budget template • Backup signer on Bank account | <ul style="list-style-type: none"> • AP/AR (e.g., invoicing, administering electronic check payments from Region accounts) (for review/approval by bank signatory) • Reconciliation/month-end close • Cash flow and projections analysis/periodic • Legacy funds – administration of review process for board approval (if uniform use across Regions) |
| Compliance/Risk Management | |
| <ul style="list-style-type: none"> • List of required state and federal corporate, nonprofit, sales tax, and related filings (reviewed/updated every 3-5 years) • Guidance regarding state and federal tax filings, charitable solicitation filings, and annual reporting • Audit guidelines (e.g., auditor selection and periodic evaluation process, level of audit required based on annual budget) • List of recommended insurance coverages (e.g., general liability, D&O, special event liability, liquor liability) | N/A |

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|---|---|
| Communications | |
| <ul style="list-style-type: none"> • Brand style guide (including naming conventions and use of logo or taglines) • Base Package communications support <ul style="list-style-type: none"> ◦ Content and calls to action (for social media, newsletters, website, etc.) ◦ Distribution and posting support (e.g., promotion of regional conferences, limited to 1 region-specific post per month, other benefits to be determined) • Website vendor sourcing, recommended architecture and features, and development of new webpage for National and for each Region (goal of redesigned National website paired with aligned subsites for each Region; target completion of mid- to late 2027) | <ul style="list-style-type: none"> • Targeted blast emails • Management of social media • Flyer/brochure development & circulation |
| Technology | |
| <ul style="list-style-type: none"> • Cloud-based document retention system and protocols • Cloud-based AMS for membership and engagement tracking • Access to a Zoom account (separate for each Region) | N/A |

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|---|---|
| Regional Programs/Service Delivery | |
| <ul style="list-style-type: none"> • Facilitation of Regional President’s Council <ul style="list-style-type: none"> ◦ National Board to adopt policy to create new body comprising Region Presidents, with an assigned National Board liaison ◦ Thought-partnership between regional presidents (e.g., programs, local engagement, member benefits) ◦ Networking and sharing of best practices ◦ Opportunities to make recommendations to the national board as a group • Regional/local conference planning (review of hotel and vendor contracts) | <ul style="list-style-type: none"> • Conference registration/payment system • Program accreditation |

