



# Competencies Brochure 2021

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*Serving the Association and Meetings Management Community Since 2004*



# Innovation Expertise Exemplary Client Service



**Our Vision:** Bobrow Associates, Inc. is recognized as the premier association and meetings management company for its innovation, expertise, and exemplary client service.



**Our Mission:** We provide excellence in association, meetings and events management, and consulting services that foster dynamic growth and success of client associations and their volunteer leaders. Fulfillment of client vision and mission is our measure of success.

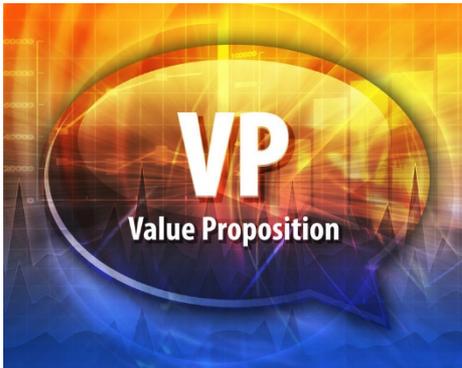
## *Our Philosophy*



Our services are modeled after industry best practices and transformed into next practices to ensure services are performed with the highest level of integrity, using all ethical and legal means to assist our clients in attaining their visions, missions, and goals.

**ABOUT  
US**

# ABOUT US



Bobrow Associates, Inc.'s values form the foundation of our organization's commitment to our clients.

- We deliver to our clients the highest quality of professional services.
- We accept only projects for which we are qualified and refuse those beyond our competency.
- We keep proprietary and confidential information confidential
- We avoid all conflict-of-interest situations.
- We achieve success when our clients' expectations are exceeded.
- We accept new clients only up to our ability to manage their businesses.
- We approach the conduct of our clients' business with the highest level of integrity and accountability.
- We treat our clients, members, and stakeholders with respect and respond promptly to their needs.



# Headquarter Office and Administration

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- Whatever your needs for daily administrative
- duties -- answering phones, responding to email
- messages, filing, to name just a few – our firm
- exists to serve the needs of your organization.
- We organize and maintain your critical documents,
- using a document retention program that protects
- vital documents and other necessary materials, while minimizing storage
- needs by eliminating unnecessary documents and files. Our telephone,
- voice mail, fax and e-mail systems, provides our clients and
- members with prompt and informative responses to their requests.
- Thinking of joining the social media revolution? We can help you with
- that as well.



# Headquarter Office and Administration Key Services



- Features a physical business presence for your organization
- Provide key staffing to handle the day-to-day administration of programs and activities
- Prompt and courteous handling of correspondence, telephone, fax and email requests.
- Maintain files and inventories, organization printed materials and supplies
- Obtain legal, accounting, insurance and other services as may be requested by the Board
- Manage election processes





# Board and Leadership Key Services

- Teleconferencing support
- Provide guidance and advice to the Board
- Develop, execute and facilitate strategic planning
- Assist Board in development of annual business/operational plan
- Planning and Policy Development
- Staffing of Committee meetings
- Facilitate online meetings
- Policy Manual Development and Maintenance
- Executive Management
- Leadership Development
- Management Consulting
- Succession Planning



# Board and Leadership Capabilities

- Bobrow Associates, Inc. is experienced at organizing, facilitating, and staffing association board, committee, and other meetings. Our work ensures that the Board and its committees focus on the policymaking issues it must deal with rather than administrative and implementation tasks. We help your association's board be a more productive and futuristically governing body.



# Financial Management

## Key Services



There is no service Bobrow Associates, Inc. provides to its clients that is more important than sound financial management.

Key Services include:

Budget development

Bookkeeping

Accounts payable/accounts receivable

Maintain bank accounts; reconcile bank accounts

Maintain financial records, journals and ledgers

Dues invoicing and collection

Preparation and distribution of detailed financial statements and budget comparisons





# MEMBERSHIP

At the core of any organization is its members. While membership growth depends on many factors, including those beyond the association's direct control (economy, state of the industry, governmental regulation, and other external factors), an effectively administered membership program can keep an association on the path to quality growth. Bobrow Associates, Inc. takes appropriate steps to maximize both membership growth potential and membership retention. We promptly respond to requests for membership information, develop prospective member lists, and create membership recruitment and retention campaigns.



Key Services include:

- ✓ Member benefits administration
  - ✓ Manage membership database
  - ✓ Process membership applications
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# MEMBERSHIP

- Membership dues, invoicing, and collection
- Develop membership recruitment packages for prospective members
- Member communication plans
- Initiate and manage membership recruitment and retention programs
- Produce membership directory
- Develop new member welcome kits
- Create membership recognition programs
- Reporting
  - Membership status
  - Dashboard
  - Trend analysis
- Chapter/affiliate management

# MEMBERSHIP

Responsive is key to getting and keeping members. Members, be they individual or corporate, have many alternatives in choosing which associations to join. Excellence in customer (member) service and relationship building will ensure that your association is their association of choice.

Bobrow Associates, Inc. believes that the members of the association are the heart of its being. In order to maintain and grow the association, concerted efforts must be made to ensure that strategies are implemented to not only retain existing members but recruit new ones as well.



Bobrow Associates, Inc. experience in membership development encompasses organizations whose membership rolls consist of individuals only, or a mix of individual and corporate/business members. While development approaches are different depending on the mix of membership, at the nucleus of any development program is the skill to assess the needs and wants of the members, and then use strategies to retain existing members while attracting new ones.

Members join organizations to fulfill some inner need. Recognition of those needs, prompt and courteous responses to individual requests and otherwise making each individual member feel they are a vital part of the association are all essential to a healthy and growing membership.



MEMBERSHIP



**BAI** Bobrow  
Associates, Inc.

# Certification and Accreditation Services



- Whether your certification or accreditation program is new or well-established, Bobrow Associates, Inc. can assist with ensuring that your program is:
- In compliance with state and/or federal laws and regulations
- Has appropriate administrative regulations and or policies and procedures in place and regularly reviewed
- Maintains and/or designs recordkeeping programs to ensure accuracy of member data
- Complies with any reporting requirements



# Advocacy/Government Relations

- If you are seeking a firm with registered lobbyists on staff, then our firm is not for you. We do, however offer the following government relations services for clients:
- Monitor legislative, regulatory, and administrative activities
- Establish and manage grassroots advocacy programs
- Manage political action committees
- Organize advocacy days, including advocacy training



# Monitor, Legislative, Regulatory, and Administrative Activities

For some clients, the ability to be aware of and informed about legislative, regulatory, and/or administrative activity that may affect their membership is essential.

Our role is to provide volunteer leadership, its committees, and its members with the information they need to ensure the organization's goals are achieved.

Where the client has its own lobbyist, our firm works closely with the lobbyist to provide the best results for the client.



# Establish and Manage Grassroots Advocacy Programs



The power of the people truly comes to life when an organization develops and maintains a grassroots advocacy program. We assist organizations in educating their members on public policy issues of importance to their profession and provide the necessary tools to maximize results.

# Establish and Manage Grassroots Advocacy Programs

- Manage Political Action Committees
- Attention to detail is critical in properly managing political action committees (PACs). Areas of particular concern are sponsorship and campaign finance rules. Our firm assists organizations to ensure their compliance reports are timely and accurately filed.
- Organize "Advocacy" Days, including Advocacy Training
- A Day at the Capitol, a Day on the Hill and other 'lobby day' programs are signature events for many organizations. Not only do members receive valuable education and training, but they also build critical relationships with various policymakers. Our firm assists organizations in creating memorable experiences for members that advance the organizations' program.





# Meetings and Events

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Bobrow Associates, Inc. takes the worry out of producing any meeting, convention, conference or other event. Whether it is a meeting for 10 or 10,000, we have the expertise to produce your event such that it exceeds your expectations.

Key Services include:

- Organize and execute annual conferences and conventions, meetings, seminars, executive retreats, workshops, golf tournaments, silent auctions, legislative day at the capital, galas and banquets
- Site selection and contract negotiations
- Lodging, function space and food & beverage arrangements
- Meeting room and experience design
- Pandemic/health and safety protocols' compliance



# Meetings and Events



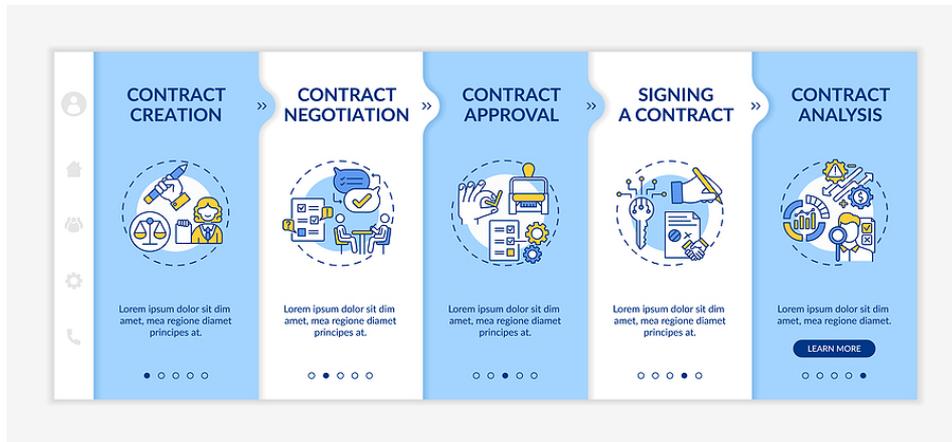
- Speaker care and management
- Audiovisual management
- Onsite management
- Post-event evaluation and recommendation

## Meeting and Event Organization

Bobrow Associates, Inc. has planned a multiplicity of meetings including small business/committee meetings, annual conferences and conventions, seminars, workshops, golf tournaments, galas and banquets, to name just a few. Bobrow believes that meetings can be an important communications tool between an organization and its members or clients. We work closely with your volunteers and committees to develop meeting and/or educational programs that serve to bolster member retention.



# Meetings and Events



## Site Selection and Contract Negotiation

Bobrow Associates, Inc. has been involved in the site selection and contract negotiations processes for more than 20 years. It is our practice to listen, understand and clarify the client's needs and wants and then proceed through the processes, ultimately providing the client with cost-benefit analyses for the client's decision. In each instance where Bobrow Associates, Inc. has negotiated contracts with venue and other suppliers, lasting relationships have been forged. Post-pandemic, there will be an increased need for experienced negotiators with the loss of so many hospitality jobs.



# Meetings and Events

## Lodging and Food & Beverage Arrangements

Whether you need lodging or food and beverage arrangements for 10 or 10,000 people, Bobrow Associates, Inc. has the expertise to manage these functions for you in a cost-effective manner.

Managing room blocks to avoid possible attrition penalties is timing. Bobrow Associates, Inc. works with the properties to closely monitor room blocks and avoid paying attrition penalties.

Inherent in the food and beverage planning process is an awareness of and planning for attendees with food allergies and/or special meal requirements. We work closely with catering staff to ensure that what is delivered matches what is reflected on the BEOs and that it is consistent with the client's goals and budget.



# Meetings and Events

## **Meeting Room Design**

The appropriate design and layout of meeting space is essential to providing a positive experience for the adult learner. Bobrow Associates, Inc. understands the role this function plays in enhancing the learning experience for your attendees. Experiential design is increasingly important in the planning of your meeting or event. Let us help you.

## **Speaker Management**

Bobrow Associates, Inc. understands the importance of a properly managed speaker program. Let us take the worry out of ensuring arrangements for your speakers while ensuring the timely receipt of completed paperwork from your speakers. We have across-the-board experience in managing speaker programs, arranging for speaker travel and lodging, abstract management and securing information from speakers so that promotional materials can be produced.





# Meetings and Events

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## Audiovisual Management

If your educational and other presentations are plentiful, management of audiovisual needs becomes a complicated project to provide the necessary equipment at the least cost to your organization. Let Bobrow Associates, Inc. manage your audiovisuals so that speaker needs are met and costs remain within your budget.



# Meetings and Events

## Onsite Management

All the careful pre-planning in the world is worthless if your onsite management team is not experienced in those logistics. Bobrow Associates, Inc. arrives early to ensure timely delivery and placement of essential equipment and meeting supplies, meet with venue staff and other providers to ensure that all parties are completely familiar with the event resume and others involved in managing the event, and to ensure that registration, staging and other areas are set according to specifications.

During the event itself, we maintain close contact with all necessary parties to ensure the smooth flow of events and to deal with any crises that may arise, including pandemic/health and safety protocols' compliance. To that end, we also work closely with venues to ensure that there is an effective emergency preparedness plan in place. We also ensure there are speaker and VIP procedures in place.



# Tradeshow Management



Let Bobrow Associates, Inc. manage your trade show. We develop strong and lasting relationships with your exhibitors and sponsors to ensure that they will return to your event year after year. Our goal is to increase your bottom line net profit and grow your show. Our expertise in trade show management begins at the show's inception and concludes with post-event evaluations and support.



We have managed tradeshow with a small exhibit floor footprint to those with more than 350,000 square feet and 5,000 attendees. We provide all facets of designing and managing the tradeshow, including floor management.

# Grant Writing Services



Bobrow Associates, Inc. now offers grant writing services to assist nonprofits in securing grants, using proven strategies to develop compelling, competitive, and successful proposals.

Key Services include:

- Assist Content Leaders in writing persuasive and strategic proposals
- Identify relevant government, foundation, and corporate funding sources
- Establish an efficient pre-proposal planning process
- Develop and organize results-oriented proposal ideas
- Prepare and write content to effectively meet proposal guidelines
- Manage and streamline submission procedures and follow-up
- Project management services to ensure compliance fulfillment

# 911 Services

- Your CEO has left the organization leaving a huge gap in leadership. As a volunteer Board of Directors, your first instinct is to replace the CEO as quickly as possible. Yet rushing to decision is exactly what you do not want to do.
- What you need to do is to analyze your current situation, determine your future direction and then methodically develop a strategy to achieve your goals. It may be that you want to appoint an Interim CEO.



# 911 Services

Your meeting planner no longer works for your organization (no matter what reason) and your annual event is just three months away. While your first instinct may be to rush out and hire someone quickly, often those decisions leave you and your organization not only disappointed at the outcome, but also saddled with an employee you would not have hired in normal circumstances.



# 911 Services



Your exhibition (trade show) manager or coordinator no longer works for your organization (no matter what reason) and your annual event is just three months away. Your best approach is to get through the event with seasoned professionals and then take your time in hiring that new employee of your choosing.





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