

**California Blood Bank Society**  
**Response to RFP for Association  
Management Services**

**Respondent**

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**Background**

Steve Bolton began his blood banking career in 2002 at Gulf Coast Regional Blood Center as a donor recruiter with subsequent positions as Corporate Accounts Consultant, Donor Services Manager, Manager – Outside Sales and Donor Recruitment Manager. Some responsibilities included Hemasphere database administrator, marketing strategy and implementation for mobile blood drives and supervision of up to 15 donor recruiters and support staff. Prior to joining Gulf Coast, Steve worked in sales for NCH Corporation, a Texas-based company that provides industrial and maintenance chemicals and related products. He has a Bachelor of Business Administration – Marketing degree from the University of Houston.

Steve was elected to the ADRP (Association of Donor Recruitment Professionals) Board of Directors in 2013, serving as conference co-chair for two years and eventually joining the Executive Committee as Treasurer. In August 2016, Steve decided to enjoy an early retirement and moved to his home in Colorado to focus on volunteer activities and his passion for snow skiing and hiking.

In October 2016, ADRP unexpectedly lost their association management provider, Swift Solutions and needed an immediate replacement. Steve stepped in beginning November 2016 and served as Executive Director at ADRP until December 2018.

Steve has been actively engaged in many volunteer activities in his community including several past board and committee positions. He currently serves as Gala Auction co-chair for the Crested Butte Open with the [Adaptive Sports Center](#), dedicated to providing outdoor activities to people with disabilities, and is on the Board of Directors and past Treasurer for [Project Hope of Gunnison Valley](#), providing support, educate and confidential advocacy to individuals affected by relationship violence or sexual assault.

## Summary of ADRP Concerns

ADRP was established in 1978 to provide educational resources and networking opportunities to donor recruitment professionals. Over the years, ADRP attempted to expand their membership to include marketing/communications and donor collections professionals to increase revenue from annual memberships and conference attendance with varying success. The most pressing challenges faced by ADRP at that time were very similar to those CBBS currently faces, including:

- Increasing costs for annual conference and declining attendance
- Declining revenue from individual and organizational memberships in ADRP
- A dwindling balance sheet after two consecutive years losing money at annual conference
- An immediate need to build a new website and database that included membership management, event registration, a website builder (to eliminate development expenses), online payment processing, email marketing, and a contact database with customized levels of member access.

## Scope of Services Provided to ADRP

As Executive Director for ADRP, Steve provided the following services:

- Administrative support to ADRP, the Board of Directors, committee chairs, and general membership
- Event management and planning for the ADRP Annual Conference
- Vendor relations and management for the ADRP Expo and Tradeshow at Annual Conference
- Board meeting management and participation at quarterly face-to-face meetings
- Website management and maintenance for event registration, membership management and job board
- Development and implementation of ADRP's marketing strategy including social media administration
- Development and distribution of the ADRP monthly newsletter, *the Drop*
- Facilitation of monthly ADRP webinars
- Primary point of contact for all ADRP-related correspondence and inquiries, acting as "the face" of ADRP.

## Highlights of Accomplishments

During two years at ADRP, the following successes were achieved:

- Hosted profitable Annual Conferences in Chicago (2017) and Dallas (2018) with overwhelmingly positive feedback from attendees and BOD
- Built new website with increased user functionality at a decreased cost (see [www.adrp.org](http://www.adrp.org))
- Implemented new membership model and increased ADRP membership from less than 300 individuals to over 700
- Stabilized ADRP finances by reducing expenses and increasing revenues

## **Proposal**

Steve Bolton proposes to provide management support services (as outlined in “Executive Director Duties” in RFP for Association Management Services) as the Executive Director of the California Blood Bank Society as an Independent Contractor at the flat rate of **\$5,500.00** per month. Additional terms:

- The Contractor will be compensated on the 1st of every month for services provided during the previous month.
- Either party may terminate this agreement upon 30 days written notice to the other without cause.
- Reasonable travel and office supply expenses will be reimbursed to the Contractor upon submission and approval of expense receipts to CBBS. Contractor to supply necessary equipment (computers, telephone, etc.) to provide services.
- The Contractor flat rate will increase by **8%** each year at the beginning of each fiscal year for CBBS, and shall cap at a maximum rate of **\$7,500.00** per month, provided that net revenue over expenses for CBBS exceeds the total cost of increase. If CBBS expenses for the prior year exceed net revenue, Contractor rate will not increase for that fiscal year.

## **Additional Services and Suggestions**

Based on the current challenges faced by CBBS, my strategy for sustained viability would have three main goals:

- Reduce expenses
- Increase member engagement
- Incorporate new ways to deliver value to members

### **Reduce Expenses:**

After reviewing the financial statements for CBBS, it is suggested that a less expensive website/AMS provider is secured. I recommend Wild Apricot as the new Association Management Solution (AMS). This AMS meets all requirements for the website and member functionality as requested in the RFP. The annual cost of Wild Apricot is approximately \$2,000, saving more than \$4,500/year as compared to the current AMS provider. More information about Wild Apricot is available [here](#). If approved, I can build out a new website on this platform by July 1, 2019 at no charge to CBBS.

### **Increase Member engagement:**

I recommend increasing member engagement with a newsletter and social media posts. Included with this proposal would be production and distribution of a monthly newsletter and regular social media posts on relevant topics to the CBBS membership.

## **Increase Value to Members:**

Working with the CBBS committees/volunteers, I recommend regular remote learning presentations are developed in the form of webinars. Regular webinars provide added value to members, can generate revenue from non-members and support the annual membership fee for individual and organizational memberships. Included in this proposal is management and facilitation of up to one webinar per month from a volunteer presenter secured by CBBS (excluding months with a CBBS regional seminar or annual meeting; webinar platform fees not included in proposal).

## **References**

Marie Forrestal  
2017 – 2019 ADRP President  
Director Donor Recruitment  
New Jersey Blood Services, A Division of New York Blood Center  
[MForrestal@nybc.org](mailto:MForrestal@nybc.org)

Theresa Pina  
2018 – 2019 ADRP Treasurer  
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