

**AGREEMENT**  
**Between**  
**National Association of Professional Process Servers**  
**And**  
**Alan H. Crowe & Associates, Inc.**

For and in consideration of the annual sum of \$189,750.00, paid monthly on the first of the month, for the period commencing January 1, 2010 and ending December 31, 2012, Alan H. Crowe & Associates, Inc. (hereafter Administrator) agrees to provide the following management services to the National Association of Professional Process Servers (NAPPS):

- 1) Administrator will provide office space in which to conduct the business of NAPPS and the requisite secure space in which to store the Association's files, records, merchandise and materials.
- 2) Administrator will provide all necessary computer and telephone equipment required to carry out the duties set forth in this agreement.
- 3) Administrator will provide the necessary personnel to perform the duties set forth in this agreement.

DUTIES

The duties to be performed under this contract by Administrator are set forth in detail in the "Outline of Services Provided by Administrator to NAPPS under Management Contract," attached hereto as Exhibit A.

EXPENSES TO BE REIMBURSED

The Administrator shall be reimbursed the following costs upon presentation of appropriate bills and receipts:

- 1) Travel and meal expense for Administrator to attend board meetings
- 2) Travel and meal expense for Administrator and necessary staff to attend annual conferences.
- 3) Such other expense as incurred by attending meetings or conducting other activities as authorized by the President or the Board of Directors.

Executed on \_\_\_\_\_

Alan H. Crowe & Associates, Inc.  
By:

National Association of Professional  
Process Servers (NAPPS)  
By:

\_\_\_\_\_

\_\_\_\_\_

## **Outline of Services Provided by Administrator to NAPPS Under Management Contract**

### MEMBERSHIP SERVICES that Administrator provides:

1. Maintains a computer database of all members and their current mailing addresses, plus a variety of additional information pertaining to branch office listings, dues, conventions, etc. New information is uploaded into database each working day.
2. Maintains separate files on all applicants, current members and former members. The total number of these files is just under 4,200. There are some 450 additional files involving A&G Committee grievances.
3. Receives and processes all membership applications to insure that they comply with the bylaws and have all the necessary information, fees and reference letters. Screens each new qualified applicant to the members.
4. Promptly investigates any objections to an applicant's fitness for membership and takes before the board all relevant objections together with the written response to the objection submitted by the applicant in question.
5. Mails membership packets to new members the first of each month, which includes a membership portfolio, directory and a variety of items including a specially prepared membership certificate and membership card.
6. Prepares and sends annual dues billing to all members, marking prorated amount on those billings where member owes less than full dues.
7. Receives and records dues payments in computer database; keeps detailed file of all dues cards returned as backup support; prepares, prints and mails new membership card showing dues have been paid for current year.
8. Makes hundreds of follow-up calls to delinquent members to pay dues; maintains accurate records of those that don't renew and the reason why.
9. Responds on a daily basis to a variety of phone calls, letters and inquiries regarding membership or other problems from members, prospective members and the public.

### MEMBERSHIP DIRECTORY work performed by Administrator:

1. Every 6 months we compile a directory from membership information in the database and supplemental material developed in-house. The Civil Rules are specially researched and updated for each edition by the Administrator.
2. Directory is completely prepared (all 500 pages) in electronic format and delivered to the printer.

3. When published, the directory is shipped to a distribution point, which labels, poly-wraps and mails the directories direct to members. Administrator provides all labeling data to shipper on disk.
4. Detailed records are kept regarding the number of directories, to whom they are shipped, and the reason for non-delivery of those that are returned.
5. A directory supplement is prepared and mailed the first week of each month containing the names of all new members, all applicants for membership, and directory changes and corrections received within the prior 30 days. This supplement (over 2,000 copies) is prepared, printed and labeled in-house by administrative personnel.

ACCOUNTING SERVICES provided by Administrator:

1. Administrator writes all checks, pays all bills and maintains computerized records on Quicken to account for all funds received and disbursed by NAPPS. Ron Ezell, the current NAPPS treasurer, has online access these records. A detailed paper record of cancelled checks, invoices and other data is also maintained.
2. A **General Checking** account is maintained by the Administrator for payment of all bills and to tracks all funds coming in and going out. Photocopies of all deposits (including individual checks) are maintained as a permanent record.
3. A **Dues** account (interest bearing) is maintained for the deposit of all dues from renewing members. Copies of these checks are also retained.
4. An **Escrow** account (interest bearing) is used for deposit of all application fees and first year's dues received from new members. Copies of these checks are also retained.
5. A **Legislation Fund** account is maintained for the holding of funds donated by members to be used for legislative purposes.
6. Various **Money Fund** accounts are maintained, all of which bear interest.
7. Various **Mutual Fund** accounts, all investing primarily in stocks, are maintained for potential growth investments.
8. Administrator prepares annual reports for corporation division filings in both Arizona and Oregon.
9. Administrator prepares and submits to our CPA all documents necessary to prepare our federal tax returns.
10. Administrator takes prepared tax returns to the Treasurer for signature and mailing.
11. Administrator works with the Treasurer in preparing an accounting report for each board meeting and the Association's annual meeting.
12. Administrator receives receipts from committee members for reimbursement and must categorize and examine the details of each expense.

THE DOCKET SHEET services provided by Administrator:

1. Publish six issues of The Docket Sheet annually.
2. The Administrator prepares a general report of topical interest for each issue of The Docket Sheet along with a Legislative Report, if there is legislative action of interest. Additionally, all information pertaining to the upcoming convention is prepared by the administrative staff and included in the publication.
3. Notifies all board members and committee chairs in advance of publication deadline
4. All advertising revenue is billed, processed through and accounted for by the administrative staff.
5. The staff prepares mailing labels and sends to printer in advance of publication of each issue.
6. The staff scanned all issues of The Docket Sheet from the first issue to the most recent issue and put them on a single disk for sale to members and others. No outside assistance was required.
7. Administrative office receives reports, compiles information, edits and finalizes each issue to send to printer.

WEBSITE:

1. Maintain the NAPPS website, including the daily uploading of member changes to listings and new members. Maintain information on committees, upcoming/past events, photos, forms, etc.
2. Maintains "Members Only" area
3. Maintains Vendors page; all advertising revenue is billed, processed through and accounted for by the administrative staff.

LEGISLATIVE SERVICES provided by the Administrator:

1. The Administrator reviews synopses of some thousand or more bills annually to identify those bills of interest to NAPPS members.
2. Those bills deemed relevant are reviewed in detail and then reported on in The Docket Sheet in the Administrator Legislative Report. No outside assistance is provided in reviewing these bills and preparing the report.
3. In those instances where time is of the essence, immediate contact is made with a member or members in the effected state so that prompt action can be taken.
4. Additional legal and/or legislative research is provided in those instances where it is required.

## BOARD MEETINGS

1. Administrator makes hotel arrangements and signs contracts for the three interim-conference board meetings at locations selected by the President.
2. Sends meeting notices to all board members and committee chairs in advance of the board meetings.
3. Publishes dates of board meetings in the monthly supplement and on the NAPPS website.
4. Prepares meeting agenda and booklet which includes a written report by Administrator covering activities since previous board meeting.

## ANNUAL CONFERENCE and SEMINAR

The activities involved in preparing for the annual conference are so varied and complex that they can't be described in few words.

Administrator selects site of conference and performs a site visit, if necessary. Signs contracts, selects menus and deals with the hotel and vendors on all levels.

Selects educational topics and speakers.

Prepares conference booklet for attendees of the Annual Meeting.

Prepares conference packets and materials (bags, lanyards, namebadges, etc.)