

## **REQUEST FOR PROPOSAL** **[Association Name]**

The [Association Name] is seeking proposals from qualified association management companies to perform the duties of chief staff executive and to serve as the Association's Headquarters Office.

### **Association Summary**

- provide a brief history of the association and describe its members (including the number of members) and what they do
- give a brief description of the programs of the association and the manner in which its activities are handled at present (e.g., another management company, volunteers, etc.)
- describe roles currently performed by volunteers and roles that will continue to be performed by volunteers under new management
- provide the latest revenue and expense budgets, including a general breakdown of both (e.g., dues, meeting registration; management, office operations, meeting expenses, etc.)

### **Selection Process**

- describe the process by which finalists will be selected and the successful company will be chosen
- give dates for:
  - receipt of proposal
  - review by committee/board
  - initial telephone or in-person interviews;
  - selection & notification date;
  - date contract will begin.
- explain how long the contract is to last and whether there will be provisions for renewal
- give the names and telephone numbers of persons to whom interested management companies may direct questions.

### **Functions of the Chief Staff Executive/Headquarters Office**

The functions expected to be performed by the individual or firm selected to manage the [association name] may include the following:

#### **Membership Services**

- Handle telephone requests and correspondence
- Assist in the production & distribution of periodic [semi-monthly, quarterly, etc.] newsletter
- Assist in the maintenance of the [association name] website (<http://www.domain.name>)
- Assist in production of membership events
- Serve as the communications center for [association name] programs and business
- Administer annual awards programs
- Attend and participate in [association name] meetings as necessary

#### **General Administration & Leadership Support**

- Oversee the updating, maintenance, and production of business stationery, brochures, membership certificates, membership directory, and other materials as needed
- Maintain membership records and database, including the receipt and processing of membership applications and renewals
- Produce mailing labels for newsletters and other items as appropriate
- Assist Board with performance of its duties, including: preparation and distribution of meeting agendas, minutes, and financial reports; establishing and issuing reminders on

action item lists; establishing a calendar of deadlines corresponding to Board meetings and bylaw

- Attend and participate in quarterly Board meetings throughout [geographic area, e.g., state, country, etc.]
- Maintain [association name] records, including meeting minutes, financial reports, mailing lists, membership rosters, newsletter archives, and other membership services collateral material.
- Research and recommend sites cities and sites for conferences and workshops, including contract negotiation and contract management

### **Meeting and Event Management**

- Conduct reviews and make recommendations regarding hotel/venue site selection
- Conduct contract negotiations for hotels and other meeting sites
- Conduct air and ground transportation negotiations and arrangements
- Make appropriate food & beverage arrangements
- Develop and implement event marketing, including program design & distribution
- Assist with program development, speaker selection/contracting, program evaluation
- Handle event registration, both advance and on-site, including acknowledgements
- Take responsibility for badges, credentialing, security, and admissions control
- Negotiate and execute entertainment contracting
- Develop and produce staging guide
- Develop and deliver BEOs for all functions, and follow up to ensure compliance
- Conduct pre-conference planning and execution tactical sessions
- Conduct insurance/risk management assessments and ensure appropriate coverage
- Conduct or make arrangements for special event planning and management

### **Financial Operations & Management**

- Receive, deposit, disburse, and report on [association name] funds
- Prepare and update budget and financial reports for the organization, including detailed financial statements, records, tax accounting, and tax filings (Forms 990 and 990-T and others, as required, in conjunction with an accounting firm retained for this purpose)
- Provide financial services for conferences and seminars, working closely with volunteers
- Prepare & produce general invoices
- Produce and distribute dues invoices
- Maintain records of accounts receivable
- Pursue receivable accounts
- Maintain general ledger of accounts
- Prepare checks for signature
- Reconcile bank statements
- Prepare and distribute monthly financial reports
- Prepare and assist in preparation of annual budgets
- Complete and file annual tax returns
- Arrange for creation and/or continuation of [association name] merchant credit card account.

### **General Management & Support**

- Provide advice and counsel to Board of Directors
- Assist in establishing and quantifying organizational goals and objectives
- Assist in achieving organizational goals and objectives

### **Your Qualifications**

Please answer the following questions so that we may have a better understanding of your capabilities and the likelihood that you can offer the breadth and scope of services we seek. Feel free to include supporting material.

## **General Background**

Please provide answers to the following questions in your proposal.

- Are you familiar with the [association name] If so, please explain.
- Please provide a list of current clients and a short description of the work you provide for them.
- Please list three client and/or professional references.

## **Administration**

- What is the largest budget your company's staff have managed?
- What is the smallest budget your company's staff have managed?
- Have you had experience in working with an outside accounting firm? If so, please explain.
- Please detail your experience in database management.
- Please detail your experience in financial reporting.
- Please describe your experience/computer capabilities.
- What kind of computer hardware and software programs do you own and operate?

## **Association Management**

- Briefly describe your professional background as it relates to duties outlined.
- Have you had experience managing an association the size of [association name]? If yes, please explain. If no, please detail how your qualifications match the outlined duties.
- Please describe your experience in managing conferences.
- Please describe your experience in collateral production.
- If you were to accept this contract, what skills/tools would you need to acquire to meet the requirements outlined on the previous page?

## **Responses**

To respond to this Request for Proposal, send [how many] copies of your proposal to:

name

address

Proposals must be received by [date & time] to be considered.

[reiterate names of persons to contact with questions and the dates for review & selection.]