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**National Association of Insurance and Financial Advisors, <XYZ> Chapter**

**(NAIFA-<XYZ>)**

<xyz>.naifa.org

**RFP FOR ASSOCIATION MANAGEMENT SERVICES**

*Proposal Deadline: <DATE>*

# SUMMARY OF ASSOCIATION STATUS

NAIFA-<XYZ> is a strong organization with healthy finances, a dedicated volunteer and membership base, and well-attended conferences and events. We are seeking proposals from a firm or individual for association management services.

# HISTORY OF ASSOCIATION

NAIFA-<XYZ> is a Chapter of the parent national organization, the National Association of Insurance and Financial Advisors. Since its founding in <year>, <additional Chapter-specific information>.

# MISSION, VISION, STRATEGIC PLAN

NAIFA-<XYZ>’s mission is to <Chapter mission>. NAIFA-<XYZ>’s vision is <Chapter vision>. Our last strategic plan was implemented in <year>, and is attached.

# TYPES OF MEMBERS

Membership is by individual; with membership dues established and collected by the National Association of Insurance and Financial Advisors, the national parent organization. Membership in the Chapter is consistent with those categories of membership authorized by NAIFA.

There are currently three classes of members:

1) **Active Members:** Insurance and financial advisors licensed to sell life, health, or property-casualty insurance, or securities, such as agents, brokers, supervisors, general agents, managers, and others engaged in local management and distribution.

2) **Associate Members:** Individuals affiliated in any capacity with the home office or agency office of an insurance company or those affiliated in any capacity with a profession or a publishing house, trust company or any other business organization related in any manner to the insurance and financial services industry. These may include, but are not limited to, accountants, attorneys, authors, editors, educators, publishers, trust officers and others in related fields of endeavor.

3) **Honorary Members:** Any person who has performed distinguished public service in the field of insurance and financial services, or in the community, and who is not an active or associate member of NAIFA may be elected as an honorary member of the Association for the period of one or more years.

# DESCRIPTION OF LEADERSHIP STRUCTURE

The affairs of the Chapter are managed by an Board of Directors made up of <Number> volunteer members of the Chapter, elected to the positions of Officers and Vice Presidents, as prescribed by the bylaws of the Association. There are <Number> Local Chapters and <Number> geographic Affiliates within our jurisdiction. In addition, numerous dedicated and active Committees do the work of the Chapter. Each Committee is led by a Chair appointed by the President including but not limited to: Government Relations, Membership, and Professional Development.

# DESCRIPTION OF MEETINGS

**Board of Directors:** Typically, the Board of Directors meets face-to-face <number> times a year (one occurring in conjunction with the Annual Conference), and monthly via conference call. Management team coordination and participation is required.

**Officers:** <Frequncy> conference calls are conducted to coordinate Chapter matters, objectives, and functions. Management team coordination and participation is required.

**Committees:** Active committees meet via conference calls at various times throughout the year. Management team will occasionally provide coordination support but participation is not always required.

**Annual Conference:** There is an annual <length> conference with <number> attendees; the location of the conference <location>. Conference attendees experience learning sessions, industry updates, enhanced professional growth, and networking. There are continuing education sessions, workshops and special events. Management team participation is required.

**Local Chapter/Affiliate Events:** Throughout the year the Chapter’s <Local Chapters/Affiliates> conduct local educational, advocacy, social and fundraising events. Management team support for these events includes <requirements>.

# PUBLICATIONS

The Chapter publishes a monthly electronic newsletter and several targeted emails each month. The emails and newsletter are sent electronically by the management company using <platform>, NAIFA-<XYZ>’s member AMS system. <List any additional physical publication requirements here.>

# SUMMARY OF CONTRACTS

**Association Management Company:** See scope of services below. The current contract expires <date>.

**Hotel:** <List any existing hotel contracts and their terms here.>

**Legislative Consulting:** <List any existing hotel contracts and their terms here.> Coordination will be needed but services are outside the scope of the Management Agreement. Contract is renewed <frequency>.

# SCOPE OF SERVICES:

**Management**

1) Management Company Facilities

a. Storage requirements – Small storage space may be required for conference/regional meeting supplies and Chapter records.

b. Phone line for the Chapter.

c. Address for the Chapter.

2) Financial Management

a. Review monthly financial reports

b. Assist in annual budget planning and development

c. Payment processing and coordination with merchant account.

3) Make recommendation of external auditor and coordinate audit.

4) Education - collect and manage abstract submissions through the State for continuing education approvals.

5) Website Support Services

a. Database – maintain, incorporate updates from Society, respond to questions/problems; work with external provider (currently YourMembership.com)

b. Website – maintain, update, remove outdated material, work with external provider (currently YourMembership.com)

6) Event Setup – setup event registration and information on website pages; requires the setup of pages with detailed information about pre-event and post event activities; requires the setup of abstract submission and information on web page, as well as detailed registration paths for multiple registrant ‘types’ (i.e. member versus non-member).

7) Publication Support Services

a. Written support – Collect and compile (graphics and copy) information for monthly e- newsletter and periodic emails and ensure that it is accurately edited.

b. Creative support – Graphics and copy on newsletters, emails, and conference brochure

8) Other Committee Support Services

a. Assist with Statewide Conference planning (website page, emails, and fliers).

b. Assist established committees and sections with event planning and communications.

9) Social Networking

a. Post to Facebook, Linked-In, Twitter accounts – keep all accounts current and active.

b. Participate with Public Relations and Communications Committees – lead a team of volunteers in posting as needed.

10) Marketing and Promotion– work with Committees and Meeting Planner to implement ideas about the Chapter web changes, email and newsletter ideas and other publications as needed.

11) Meeting Attendance – be in attendance at all meetings of the Executive Committee and Officers calls.

12) Vendor Alliance – nurture relations with existing Chapter vendors and prospective vendors to assure a strong base and relationship continues between each vendor and the Chapter. The primary vendor activity is sponsorship and/or exhibiting at the annual state conference. The secondary vendor activity is sponsoring events at the <Local Chapters/Affiliates> level.

13) Membership Growth & Fundraising

a. Develop and implement a Membership Plan that outlines annual goals and strategies for recruiting new and retaining existing members.

b. Propose and Develop new programmatic revenue streams.

**Bookkeeping Services**

1) Generate monthly financial reports (P&L; budget comparison; balance sheet, accounts payable, accounts receivable, monthly reconciliation report).

2) Receipt of income from conference activities (registration and sponsorships); bi-weekly accounts payable for contracts and reimbursement of expenses.

3) Enter all processes into QuickBooks/financial spreadsheets.

4) Credit card processing for registrations/sponsorships as needed.

5) Payment processing and coordination with merchant account.

6) Preparation of semi-monthly disbursements

7) Coordination of documents for annual tax preparation with an external CPA.

8) Provide support for audit.

9) Maintain an accurate accounting of performance to budget and forecast.

**Annual Conference Management**

1) Work with Committee Chairs in the planning and execution of the Annual Conference.

2) Provide updated reports on registration, exhibit hall sales, sponsorships and budget periodically prior to the conference.

3) Collect and manage registrations pre-conference and onsite.

4) Once a program is established by the committee for conference, manage speakers.

5) Assign classroom location and setup.

6) Pre-conference activities: design/production of badges, integration with lead retrieval system, ribbons, support for multiple promotional codes, coordination of all signage in consultation with the Conference Committee, send out/collect RFP for third party vendors as needed, manage hotel communications about changes, assist with food selection/ordering, participate in discussions about room(s) set-up, participate in bi-weekly pre-conference calls with Conference Committee, prepares correspondence to keynote speakers, presenters and exhibitors, and responds to their questions both in writing and/or over the phone.

7) Exhibits Management - work with vendors/provide and collect sponsorship information, manages registration of individual exhibitor personnel, provides onsite exhibit hall layout and provides management within exhibit hall during load-in and load-out and throughout the event.

8) Create a working budget that is easily updated for the conference.

9) Staff during event – provide appropriate staff to execute the conference.

10) Staff to manage registrations and other events (on site or off property) as required; staff must arrive at least one day prior to the event to manage the assembly and testing of the registration center, which includes: registration packet pickup, badge name changes, material distribution, on-site registration, payment processing, speaker check-in, survey collection, supervision of all staff as needed; promotional item fulfillment; coordinate and handle AV onsite; ensure the proper placement of signage, and general conference information; handles daily notifications of program changes; assist keynote speakers with logistics; monitors F&B orders and coordinates changes as needed.

11) Brochure/Program Development (as described in Publications section).

12) Marketing and Promotion of Conference – Implement ideas about the Chapter web changes, email and newsletter ideas and other publications as needed.

13) F&B Selection – assist Conference Committee with selection and ordering; works directly with Hotel to communicate final decisions and make adjustments as needed.

14) Housing Coordination – manage full housing process with hotel including managing attrition and providing weekly reports in the last 6 weeks prior to conference.

15) Provide scanners and coordinate staff and volunteers to scan name badge of attendees at continuing education courses.

16) Within one week of conference, submit all required continuing education attendance records to the State of Florida including but not limited to landscape architecture and architecture.

17) Provide conference evaluation and close out report along attendee and vendor evaluation surveys within 10 days.

18) Review and reconcile all vendor bills including hotel and food service within 30 days of conference. Provide final cost analysis including actual vs. budgeted expenses and revenues within 45 days of conference.

# RESPONSE FORMAT & PROPOSAL INSTRUCTIONS

Responses must include the following information that will serve as the basis for rating demonstrated qualifications of the individual/firm in this RFP. In the review process, NAIFA-<XYZ> will evaluate the proposal based on the following information that must be submitted in each response:

**Please provide a PDF file that is tabbed for the following items:**

1) A description of how the association manager is organized to serve NAIFA-<XYZ>.

2) An indication of your ability to provide support for each aspect of the Scope of Services section above. Also indicate services that you typically outsource.

3) An explanation of the manager's experience in related industries.

4) Proposed fee/salary for management services.

5) The qualifications, professional experience and responsibilities of the manager/team who will serve our association.

6) A representative client list and references that includes the following information:

a. Company name, address and phone number

b. Contact name, title and email

c. Website address (if applicable)

**Submission and General Instructions**

Individuals and firms responding to this announcement shall submit their proposal by email to NAIFA-<XYZ> President <Name> (**Email**) by <deadline>. Late proposals will not be accepted.

# TIMELINE

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| --- | --- |
| All proposals due date  | <Date>  |
| Review of proposals by search committee  | <Date> |
| Interview(s) of Finalist  | <Date> |
| Presentation of finalists to the Executive Committee  | <Date> |
| Selection and negotiation of contract specifics  | <Date> |
| Transition process  | <Date> |
| Formal start date  | <Date> |

The following timeline will apply to this process:

If the timeline changes, the Management Committee will keep respondents apprised.

## Evaluation and Selection Process

The NAIFA-<XYZ> Board of Directors will evaluate the merits of proposals received in accordance with the evaluation factors stated in this RFP and will identify the proposal that is most advantageous to the Chapter. Numeric evaluations will be used to identify strengths and weaknesses of proposal and to establish a ranking based on the following criteria:

* Demonstrated experience in association or business management
* Demonstrated capacity to a manage administrative tasks
* Ability to provide support for association activities
* Ability to assist with financial reporting and documentation
* Pricing
* Individual/firm’s experience, qualifications, and key personnel, and the extent to which the qualifications, experience, and past performance are likely to foster successful, on-time performance

Proposals that are incomplete in terms of the requirements of this RFP will not be considered. Individuals/firms will not be provided and opportunity for proposal revision.

All individuals/firms must meet the minimum requirements established by this RFP to be eligible for award. NAIFA-<XYZ> reserves the right to reject any proposals or parts thereof.

# CONTACT INFORMATION

For questions regarding this RFP, please contact:

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| --- | --- |
| Name: Email: Phone:  | <Name> **<Email>** <Phone>  |