

REQUEST FOR PROPOSAL
ASSOCIATION MANAGEMENT COMPANY/CHAPTER ADMINISTRATOR

RFP Publication Date: July 13, 2021

PROPOSAL PROTOCOL & SUBMISSION INFORMATION

Intent to Bid

We request notification of your intent to bid or not bid by July 27, 2021 via e-mail to MPI Admin at admin@mpiottawa.ca

Questions

We invite you to submit questions, via email, by 5:00 p.m. (Eastern Standard Time) on August 10, 2021 to MPI Admin at admin@mpiottawa.ca

A composition of all questions with answers will be distributed electronically to all bidding companies by end of business, August 13, 2021.

Submission Information

Proposals must include complete responses to each question in the order presented in this RFP. Please include with your proposal the completed excel Task List Form indicating which tasks you are proposing to support. (You may opt out of tasks you are not able or willing to support)

Submission Due Date

All proposals must be submitted electronically by 5:00 p.m. (Eastern Standard Time) on Friday August 27, 2021 to MPI Admin at admin@mpiottawa.ca

Please use the subject line **“MPI Ottawa Association Management Proposal”** in your email.

Interviews

Selected candidates will be invited to an interview and presentation opportunity. Presentations will be no more than 30 minutes and must specifically demonstrate your ability to execute the requirements in the RFP.

Selection Criteria

Submissions will be evaluated by a panel of MPI Ottawa Board of Directors using the following points system.

Skill	Description to earn maximum points	Max Points
Experience and Expertise	Experience and expertise providing association management services. Demonstrated experience in all	30 points

	tasks included in the Scope of Work. A review of references will be part of this section.	
Skill Set	Demonstrated capacities in the team as per the Skills Set Chart.	20 points
Price	A value comparison will be completed to determine number of services offered in your completed Task List Form vs proposed admin fee	10 points
Presentation and Communication	Clear and concise communication. Written skills will be evaluated through your proposal and presentation and communication skills will be evaluated during interview.	10 points
MPI Member	MPI Ottawa values our supplier members and promotes our “buy from members” program.	5 points

Notification Date

All candidates will be notified concerning the final decision of the MPI Ottawa Board of Directors September 30, 2021.

Selected Chapter Administrator to begin managing the chapter on October 15, 2021.

Timelines

Due Dates

RFP Issued	July 13, 2021
Intent to bid	July 27, 2021
Question to be submitted to MPI Admin	August 10, 2021
Responses to all questions distributed to Intent to bid list	August 13, 2021
Proposal submitted to MPI Admin	August 27, 2021
Presentations & Interviews with MPI Ottawa	September 7 to 17, 2021
Contract awarded & all bidders notified	September 30, 2021
Contract start date	October 15, 2021

OVERVIEW

Meeting Professionals International (MPI) is the pivotal force in positioning meetings as a primary communications vehicle and a critical component of an organization's success. MPI leads the industry by serving the diverse needs of all people with a direct interest in the outcome of meetings, educating and preparing members for their changing roles and validating relevant knowledge and skills, as well as demonstrating a commitment to excellence in meetings.

About the Ottawa Chapter

The 180 member Ottawa Chapter of MPI, established in 1984, empowers its members to increase their strategic value with education, professional development, and business growth opportunities.

Additional information can be accessed through the MPI Ottawa website at www.mpiottawa.ca and on the social media channels listed below:

Facebook: www.facebook.com/mpiottawa

Twitter: www.twitter.com/mpiottawa

LinkedIn: <https://www.linkedin.com/groups?home=&gid=2483849&trk=anet Ug hm>

Contract Terms

We are looking for an 8-month trial contract from October 15, 2021 to June 30, 2022. We will look to secure these services on an annual contract basis after a successful trial. After three (3) years, the chapter is required to go through an RFP process.

Contract Services Required:

Chapter Administrator

Key Characteristics of our future chapter administration partner:

- Focus on the need for streamlining processes
- Capacity to respond to the chapter's needs in a timely fashion and with flexibility
- Enhance the chapter's image in a positive and professional light
- Courteous, efficient, experienced event managers
- Strong written, verbal and interpersonal communication skills in English (+French an asset)

Skills we expect:

- Expertise in working with an annually transitioning volunteer board
- Expertise in strategic planning and board management including board meeting structure
- Expertise in association management/operational tasks
- Expertise in financial/budget management in QuickBooks & Excel
- Expertise in meetings and event management
- Expertise in contract review and negotiation
- Expert communication skills

- Expertise in developing and implementing processes for efficiencies
- Software skills for applications already in use or suggestions on improved systems
- Knowledge of website management & email automation programs such as Mailchimp
- Demonstrated organizational skills
- Proficiency with Microsoft Office Suite, Quickbooks, Adobe Acrobat, Excel, Basecamp, Airtable, ProfitKeeper, and event registration software

Behaviors we require:

- | | |
|-----------------|---------------|
| • Ethical | • Accountable |
| • Responsive | • Efficient |
| • Diplomatic | • Detailed |
| • Reliable | • Creative |
| • Flexible | • Accurate |
| • Collaborative | |

SUBMISSION REQUIREMENTS

Proposals must include complete responses to each question in the order presented below. You may clearly specify any tasks deselected in your proposal that you may not be willing or able to support.

A. Knowledge of Industry/Organization

1. Describe your knowledge of MPI. Are you currently a member? Have you attended an MPI local/regional/world conference? Are you currently or have been an MPI Chapter Administrator with administrator designation? Have you held a Chapter volunteer and/or leadership role?
2. List any other meeting/hospitality industry organizations to which you belong. Please indicate any current or past leadership roles.
3. List attendance at any industry-related national conferences in the last 3 years, i.e. MPI, CSAE, PCMA
4. List all industry standard designations held by team members

B. Company History

1. Years of experience in association management
2. Years of experience, if any, specific to meeting management skills
3. A description of your specific skills and resources relevant to the requirements listed below.
4. A description of the size of your company (*Requirement: licensed business with Professional Liability insurance - minimum \$250,000 each claim and aggregate.
5. At least 2 relevant client references with contact name, phone and e-mail address

C. Location and Accessibility

1. Location from which services would be provided

2. A description of how travel will be handled to support needed services

D. Technology and Staff

1. Technology set-up, including volume capabilities. Please address the following mandatory requirements: Computers, laptops, internet access & speed, phone(s), scanner, printer, back up server & supply storage.
2. Staff support available; clearly identify how services will be managed by you and or your staff/partners
3. Description, responsibilities and biographies of staff who will work as part of the administration team. Please include any industry standard designations held by your team.
4. Description of any real or perceived conflict of interest in working with the MPI Ottawa Chapter

E. Fees

1. Monthly fee based on time estimates of required services as listed in RFP
2. Estimated travel, office and miscellaneous out-of-pocket expenses per month/year

F. Additional Services or Skills

1. List any additional contributions you feel you could make or skills that set you apart

SUMMARY SCOPE OF WORK

(Estimate 40 hours per month)

STRATEGIC & LEADERSHIP SUPPORT

- Assist OOP (Office of the Presidents) with administration and logistical aspects of monthly Board meetings and the annual and mid-year Board retreats.
- Assist President with administration of Board members attendance at MPI annual conferences and events. This includes but not limited to coordinating travel, accommodation, registration and other logistical requirements including itineraries or back up documentation.
- Gather monthly dashboard metrics from board reports and update online Chapter Dashboard metrics.

BOARD MEETINGS & RETREATS

- Attend in administrative capacity Board meetings and bi-annual retreats.
- Attend in administrative capacity Executive Committee meetings as requested.
- Attend pre-board meeting with OOP.
- Advise on governance and policy and procedure issues.
- Manage Board reporting timelines, reminders, report collection and meeting documents in basecamp.
- Assist Board of Directors in ensuring policies & procedures are followed

- Take meeting minutes at Board, Retreat and Exec. Meetings, distribute to Board and file in basecamp upon review and approval by President.
- Manage RFP process for board and retreat meeting function space, AV & F&B.

FINANCE & BOOKKEEPING

- Provide full accounting services including AR & AP management, Invoicing and Reconciliations using Quick Books.
- Process credit card receivables and reconcile merchant accounts.
- Prepare monthly financial statements, including Balance Sheet, Income Statement, General Ledger and Aging A/R.
- Ensure accountant is provided all relevant documents for the annual financial audit or review.
- Maintain all accounting records using general accepted accounting principles.

If providing full accounting services, please address the full list.

If not providing full accounting services as above – please address this task list only :

- Assist with the development and maintenance of the Annual Budget spreadsheets.
- Work with the MPI Ottawa contracted accounting firm to provide all required documentation.
- Work with the accountant to prepare tax returns and financial filings.
- Initiate update of Bank signatures with President, President-Elect, Immediate Past President, and VP Finance each July.
- Work with Directors of Partnerships to create advertising rate cards, advertising schedules and contracts as per negotiated details.
- Work with appropriate teams to ensure contracted marketing and sponsorship benefits are being delivered.
- Prepare & Send advertising and sponsorship invoices and provide copies to accountant.

EVENT REGISTRATION SERVICES (Typically 10 events per year)

- Prepare online registration based on promotional text and details received from committee.
- Collaborate as needed with the Chapter's online event registration provider.
- Provide committee chair with registration numbers/lists and special meal requests.
- Work with Committee Chair to create event RFPs.
- Manage the RFP process and provide a bid summary to the event committee.
- Create and Prepare registration materials and name badges for all pre-registered attendees prior to event.
- Deliver pre-registration materials and oversee registration desk including onsite registrations at large live chapter events (Onsite registration services will be purchased on a per event basis based on number of expected participants).
- Reconcile fees, payables and registration lists vs budgets and prepare event report with Event Director.
- Handle registration and sponsor collections post event.

- Order & store name badge, ribbons, lanyards and other event supplies.
- Support registration team with special instructions and customer service solutions.
- Provide administrative tasks regarding event partners/sponsors. This includes pre and post event deliverables as per partnership contracts.

The Event Committee will be responsible for all program content & design, site logistics, speaker coordination, audio/visual and related production, décor, & calendar scheduling.

COMMUNICATIONS

- Send weekly eblasts, with input from the Board, Communications and Publications Committees.
- Manage chapter email, respond to member questions and distribute emails for action by Board when required.
- Send out communications reminders to Board of Directors and committees via email.
- Process payments for advertisement in Chapter publications.

WEBSITE

- Add updates and changes to the website using appropriate software.

DATA AND RECORDS

- Maintain all corporate and association data on basecamp and at physical premises.

ADMINISTRATION

- Distribute specialty emails as per committee's or leadership requests (e-blast).
- Design and create administrative forms as needed.
- Send links and invites to the MPI Chapter Operations Manager (COM) including newsletters, meeting notices, Board meeting minutes and Chapter compliance forms.
- Assist in proofing and posting the Chapter newsletters, meeting notices, nominations letters, scholarship forms, RFPs award nominations, financial reports, and other Board communications to the members.
- Provide mailing labels and/or data files as requested or directed by the Board of Directors.

MEMBER SERVICES

- Provide committee and Board member support via emails.
- Provide up to date membership data to committees as needed.
- Facilitate memberships renewals as needed.
- Assist with member questions and redirect as appropriate to Board of Directors.

JOB BANK & RESUME POSTING

- Receive local job announcements and process payments.
- Post job listings or Career Opportunities to website.

- Send follow up reminders to job advertisers for listing removal.

OFFICE MANAGEMENT, EQUIPMENT AND SERVICES

- Maintain admin email as central clearing point for all general Chapter correspondence and inquiries.
- Maintain standard office equipment along with computer system and appropriate software – ensuring compatibility with ongoing technology and software.

APPENDIX

MPI Ottawa Association Management Task list.xlsx