



REQUEST FOR PROPOSAL

ASSOCIATION MANAGEMENT COMPANY/CHAPTER ADMINISTRATOR

RFP Publication Date: July 8 2026

PROPOSAL PROTOCOL & SUBMISSION INFORMATION

Questions

We invite you to submit questions, via email, by 5:00 p.m. (Eastern Standard Time) on August 10, 2026 to Nicole Jeffrey, President, at president@mpiottawa.ca

A composition of all questions with answers will be distributed electronically to all bidding companies by end of business, August 13, 2026.

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 Thursday, September 3, 2026 to Nicole Jeffrey at president@mpiottawa.ca

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

Interviews

Selected candidates will be invited to a virtual 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 tasks included in the Scope of Work. A review of references will be part of this section.	30 points
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 October 2, 2026.

Selected Chapter Administrator to begin managing the chapter on January 1, 2027, with the transition period beginning in early November 2026.

Timelines**Due Dates**

RFP Issued	July 8, 2026
Question to be submitted to MPI Ottawa President	August 10, 2026
Responses to all questions distributed to Intent to bid list	August 13, 2026
Proposal submitted to MPI Ottawa President	Sept 3, 2026
Presentations & Interviews with MPI Ottawa	September 18 to 28, 2026
Contract awarded & all bidders notified	October 2, 2026
Transition period begins	November 2026
Contract start date	January 1, 2027

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 215 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/mpriottawa

Twitter: www.twitter.com/mpriottawa

LinkedIn: https://www.linkedin.com/groups?home=&gid=2483849&trk=anet_ug_hm

Contract Terms

We are looking for a 3-year contract from January 1 2027 to December 31st, 2029. The contract can then be renewed annually for a maximum of 2 years. After five (5) years, the chapter is required by our policies 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 CVENT
- Demonstrated organizational skills
- Proficiency with Microsoft Office Suite, Quickbooks, Adobe Acrobat, Excel, Basecamp, and event registration software

Behaviors we require:

- Ethical
- Responsive
- Diplomatic
- Reliable
- Flexible

- Collaborative
- Accountable
- Efficient
- Detailed
- Creative
- Accurate

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

(Estimated average of 50 hours per month. Time periods leading up to major events (awards, charity auction) would be more, and the summer months would be less)

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.
- Gather monthly dashboard metrics from board reports and update online Chapter Dashboard metrics.
- Provide administrative support and assist with website updates for the board applications and recruitment process

- Working with the Immediate Past president, provide Administrative support for the AGM

BOARD MEETINGS & RETREATS

- Attend in administrative capacity Board meetings and bi-annual retreats.
- 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
- Assign tasks and action items to board members on basecamp
- 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 as required
- Work with Directors of Partnerships to create advertising rate cards, advertising schedules and contracts as per negotiated details.
- Work with appropriate event teams to ensure contracted marketing and sponsorship benefits are being delivered.

- Provide each event team with a list of sponsorship deliverables, and ensure that the committee delivers these benefits in the timelines required
- Prepare & Send advertising and sponsorship invoices and provide copies to accountant.

EVENT REGISTRATION SERVICES (Typically 9 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 .
- 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.

CHAPTER AWARDS

- Provide Administrative support to the VP Membership and Awards Committee on coordinating the chapters awards process
- Prepare communications, vetting lists of eligible members, ordering awards, website updates

COMMUNICATIONS

- Send bi-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 Regional Operations Manager (ROM) 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

TASK	AMC Involvement
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.	Lead Support
Gather monthly dashboard metrics from board reports and update online Chapter Dashboard metrics.	Full Ownership
Provide administrative support and assist with website updates for the board applications and recruitment process	Shared Responsibility
Working with the Immediate Past president, provide Administrative support for the AGM	Lead Support
BOARD MEETINGS & RETREATS	
Attend in administrative capacity Board meetings and bi-annual retreats.	Shared Responsibility
Advise on governance and policy and procedure issues.	Shared Responsibility
Manage Board reporting timelines, reminders, report collection and meeting documents in basecamp.	Full Ownership
Assist Board of Directors in ensuring policies & procedures are followed	Shared Responsibility
Assign tasks and action items to board members on basecamp	Full Ownership
Take meeting minutes at Board, Retreat and Exec. Meetings, distribute to Board and file in basecamp upon review and approval by President.	Full Ownership
Manage RFP process for board and retreat meeting function space, AV & F&B.	Lead Support
FINANCE & BOOKKEEPING	
Provide full accounting services including AR & AP management, Invoicing and Reconciliations using Quick Books.	Full Ownership
Process credit card receivables and reconcile merchant accounts.	Full Ownership
Prepare monthly financial statements, including Balance Sheet, Income Statement, General Ledger and Aging A/R.	Full Ownership
Ensure accountant is provided all relevant documents for the annual financial audit or review.	Lead Support
Maintain all accounting records using general accepted accounting principles.	Lead Support
Assist with the development and maintenance of the Annual Budget spreadsheets	Lead Support
Work with the MPI Ottawa contracted accounting firm to provide all required documentation.	Lead Support
Work with the accountant to prepare tax returns and financial filings.	Lead Support
Initiate update of Bank signatures as needed	Full Ownership
Work with Directors of Partnerships to create advertising rate cards, advertising schedules and contracts as per negotiated details.	Minimal Support

Work with appropriate event teams to ensure contracted marketing and sponsorship benefits are being delivered.	
Provide each event team with a list of sponsorship deliverables, and ensure that the committee delivers these benefits in the timelines required	Shared Responsibility
Prepare & Send advertising and sponsorship invoices and provide copies to accountant.	Full Ownership

EVENT REGISTRATION SERVICES (Typically 9 events per year) 3-4 education, 2 signature, 2 member events)

Prepare online registration based on promotional text and details received from committee.	Full Ownership
Collaborate as needed with the Chapter's online event registration provider.	Full Ownership
Provide committee chair with registration numbers/lists and special meal requests.	Full Ownership
Work with Committee Chair to review event RFPs.	Minimal Support
Manage the RFP process and provide a bid summary to the event committee.	Lead Support
Create and Prepare registration materials and name badges for all pre-registered attendees prior to event.	Full Ownership

Deliver pre-registration materials and oversee registration desk including onsite registrations at large live chapter events	Full Ownership
Reconcile fees, payables and registration lists vs budgets and prepare event report with Event Director.	Full Ownership
Handle registration and sponsor collections post event.	Full Ownership
Order & store name badge, ribbons, lanyards and other event supplies.	Full Ownership
Support registration team with special instructions and customer service solutions.	Shared Responsibility
Working with committees, partnership director and sponsor liaison, provide administrative tasks regarding event partners/sponsors. This includes pre and post event deliverables as per partnership contracts.	Shared Responsibility

CHAPTER AWARDS

Provide Administrative support to the VP Membership and Awards Committee on coordinating the chapters awards process	Full Ownership
Prepare communications, vetting lists of eligible members, ordering awards, website updates in conjunction with Membership team	Shared Responsibility

COMMUNICATIONS

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

WEBSITE

Add updates and changes to the website using appropriate software. Responsibility shared with Communications team	Shared Responsibility
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DATA AND RECORDS

Maintain all corporate and association data on basecamp and at physical premises.	Full Ownership
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ADMINISTRATION

Distribute specialty emails as per committee's or leadership requests (e-blast).	Lead Support
Design and create administrative forms as needed.	Full Ownership
Send links and invites to the MPI Chapter Regional Operations Manager (ROM) including newsletters, meeting notices, Board meeting minutes and Chapter compliance forms.	Full Ownership
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.	Full Ownership

MEMBER SERVICES

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

JOB BANK & RESUME POSTING

Receive local job announcements and process payments.	Full Ownership
Post job listings or Career Opportunities to website and add to newsletter	Full Ownership
Send follow up reminders to job advertisers for listing removal.	Full Ownership

OFFICE MANAGEMENT, EQUIPMENT AND SERVICES

Maintain admin email as central clearing point for all general Chapter correspondence and inquiries.	Full Ownership
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