



Request for Proposals
Association Management Services
Deadline: October 23, 2020

Overview

The Professional Developers of Iowa (PDI) is seeking proposals from qualified individuals and firms for the provision of association management services to PDI. The following Request for Proposals (RFP) describes the areas of expertise that are sought in support of PDI executive/administrative, financial, promotion, membership development, and event related tasks.

PDI seeks to establish contract with an individual or firm that is experienced in providing professional association management services. The PDI Board will conduct an evaluation of submitted proposals and will award a contract to the organization whose proposal is determined to be most advantageous to PDI considering the factors set forth in this RFP.

PDI desires an association management provider willing to invest the time and effort necessary to understand: the partners, process and profession of economic development in the State of Iowa; the interests, needs, motivations, and challenges of economic developers, service providers, state departments, and legislators; association management industry trends and strategies that can help PDI strengthen and grow in its value to current and prospective members, contribution to economic development in Iowa, and overall brand and profile as a statewide leader. Ideally, this provider would have a presence within Iowa and preference will be given to organizations that can demonstrate success in working with Iowa organizations.

The initial contract resulting from the RFP will be effective after approval by the PDI Board to start on an agreed upon date (target date January 1, 2021) for a period not to exceed three (3) years, with annual renewal contingent upon contractual requirements being satisfied based on a midyear review and an end-of-year review by the PDI Executive Committee.

The PDI Board will determine when it will be appropriate to issue a new RFP for management services or to renew for a successive contract.

Background Information

The Professional Developers of Iowa (PDI) is an organization of economic development professionals working to grow and develop Iowa's economic base. PDI's more than 310 members come from a variety of disciplines: county and regional developers, community developers, utilities, legal and financial firms, universities, community colleges, engineering and construction firms, and rail transportation companies.

Purpose & Mission Statement: PDI is a state association of economic development professionals united to strengthen communities and drive the long-term growth of Iowa.

PDI's leadership consists of a 13 member Board of Directors.

As of 9/01/2020, PDI operates with five standing committees (education, Fall conference committee, legislative, membership and public relations/communications. As of January 1, 2021, PDI will consolidate these into the education/conference team, legislative team, and membership/public relations team.

Visit <https://www.pdiowa.com/> for additional information on the Professional Developers of Iowa.

Scope of Contracted Work

Qualified members of the association management provider (AMP) will be assigned to the PDI executive team to oversee the day-to-day activities of PDI. The assigned PDI Executive Director will coordinate and assign work to AMP team members who assist with PDI.

1. Administration, General Office, Facilities and Inventory:

- a. Maintain PDI's headquarters with business equipment and services (telephones, high-speed Internet, computers, business software, Zoom account, photocopier, printers, etc.)
- b. Maintain, update and utilize association data management software, with secure backup systems and web-based remote access.
- c. Respond to requests and inquiries via e-mail or telephone within 24 - 48 business hours.
- d. Communicate necessary information and provide administrative support to enhance the completion of PDI's goals and objectives.
- e. Oversee and order PDI supplies (letterhead, envelopes, name badges, board supplies etc.).
- f. Maintain storage, manage files, and archive the records of PDI. Establish, maintain and safely store permanent files, (Articles of Incorporation, Bylaws, Minutes, Policy Manuals, Procedures Manuals, etc.), archive historical information and perform necessary records management.
- g. Provide association management expertise, advice and guidance to the Board of Directors as needed and when appropriate.
- h. Consult with executive committee regarding issues, strategic plans, budget, goals and activities of PDI.
- i. Coordinate general liability, property and casualty, crime, professional liability, errors and omissions and electronic data processing insurance coverage.

2. Board & Committee Management:

Board Meetings: 6 per year (every other month 1.5 to 2hrs each)

Executive Committee Meetings: 6 per year (monthly up to 45 minutes each)

Correspondence with Board Chair: Email correspondence

Attend PDI Strategic Planning: 4-8 hours annually

Team Meetings:

Membership/Public Relations: Four 1-hour online meetings per year - schedule TBD with Chair

Education/ Conference: Six 1-hour (Twelve: 30 minute) online meetings per year - schedule TBD with Membership Chair

Legislative Team: Four 1-hour online meetings per year - schedule TBD with Chair

- a. Provide association expertise and guidance to the Board and Executive Committee.
- b. Stay current with association/industry trends through communication with association organizations, professional development and ongoing association education.
- c. Provide a management call/update to the PDI Executive Committee – 12 times per year.
- d. Communicate with the Board/Executive Committee to monitor action items, development of work plan and annual committee reports for membership.
- e. Make all logistical arrangements for PDI Board meetings (online or in-person).
- f. Provide staff support for PDI Board meetings. (Support includes development and distribution of agenda created in conjunction with the President, assist with gathering board packet contents, meeting information, distribution of appropriate attachments and meeting support materials, post Board information to the Website, recording minutes, distribution of completed minutes and Board-related support work, filing minutes in permanent file and electronic format.)
- g. Work directly with the Secretary/Treasurer on the development of financial report of each Board meeting.
- h. Prepare Board orientation material, provide conference calling information and assist in new Board orientations.
- i. Meet monthly with the President and/or executive committee to monitor task lists.
- j. Assist the PDI Secretary/Treasurer by distributing all election notices, meeting notices, and other official PDI correspondence deemed necessary by the PDI Board of Directors.
- k. Work with Committee Chairs to provide appropriate reports (membership, budget, etc.) for PDI Board meetings.
- l. Respond to Board members' informational requests.
- m. Maintain a PDI calendar of activities for both internal and external use.
- n. Maintain updated policies (developed by the PDI Board of Directors).
- o. Maintain an updated events procedures manual and event related insurance as appropriate for committees.
- p. Upon review by the board and with appropriate Board and membership approval, Staff will implement bylaws changes.
- q. Staff will work with the Nominations Committee to schedule the nominations of the Board and to coordinate voting on an annual basis.
- r. Assist the PDI Incoming President with arrangements and distribution of (but not facilitation of) PDI's strategic planning process and plan. Work with the Board of Directors and Committee Chairs to monitor progress on completing the strategic plan. Attend planning session to represent AMP.

3. Financial Management:

- a. Secure general liability coverage and directors and officers insurance for PDI in consultation with the Exec Committee.
- b. Be proactive in all areas of financial management with ongoing communication through the Treasurer with the Board of Directors to ensure PDI's financial sustainability.
- c. Advise Board in setting fees for registration, sponsors and exhibit fees and membership dues levels.
- d. Maintain all PDI records in compliance with record retention policies.

- e. Maintain a comprehensive, all-in-one financial accounting system, and maintain a database with potential, former and existing members, sponsors, advertisers, meetings attendees records linked with their financial information.
- f. Prepare monthly financial reports and maintain financial records. (The Statement of Activity, Statement of Financial Position and Dashboard are distributed to the Board monthly. The Statement of Activity, Statement of Financial Position and general ledger are distributed to the Treasurer monthly.)
- g. Maintain checking and investment accounts as directed by the Board.
- h. Produce and maintain PDI Annual Conference reports of attendance, registrations, sponsorships, revenues & expenditures.
- i. Assist with preparation and arrange for completion of annual tax documents using an outside CPA.
- j. Arrange for completion of annual external review of financial records using an outside CPA, per request of the Board of Directors.
- k. File 1099 miscellaneous income tax returns (vendors, speakers, etc.) with IRS.
- l. Work with the PDI Board to implement and maintain governance policies and best practices in compliance with IRS Form 990 requirements.
- m. Work with the PDI Secretary/Treasurer to prepare a realistic annual budget and monitor actual performance to this budget.
- n. Provide Secretary/Treasurer with a year-end financial statement.
- o. Invoice and receive monies (i.e., dues, conference registrations, etc.).
- p. Re-invoice outstanding receivables every thirty (30) days.
- q. Orient Secretary/Treasurer to their responsibilities and payment systems.
- r. Prepare invoice payments for review by the PDI Secretary/Treasurer. Monitor all requests for payment comparing them to the PDI budget.
- s. Collect, record and deposit into checking account all cash and checks received.
- t. Process credit card payments including event registrations.
- u. Assist with financial trends analysis and communicate information to the PDI's Board of Directors, Treasurer and/or President.
- v. Maintain bank and investment accounts per the direction of the Board of Directors.
- w. Maintain data on all contractual relationships.
- x. Provide other services as deemed necessary to ensure accountability of the financial assets of the organization.

4. Conference/meetings management (annual conference, events, educational sessions/webinars):

- a. Work with PDI Committee Chairpersons to establish timelines and tasks; work within those parameters.
- b. Work with the PDI Committee Chairpersons to develop budgets and appropriate fees; work within those parameters. Reconcile all revenue and expenses.
- c. Work with Committee Chairpersons to identify location for future conferences.
- d. Conduct site visits and upon site approval, gain commitments through hotel/meeting facility and other local establishments at which PDI may hold functions. Review contracts and negotiate outcomes.
- e. Work with the Committee on theme, speakers, program content and logistics for conferences and meetings.
- f. Once the Committee has identified speakers for the conference, email confirmation and conference information to them, keep track of audiovisual equipment needs, handouts, meeting room logistics, handle lodging and travel arrangements.

- g. Once the Committee has identified sponsors for the conferences, email confirmation, thank you letters and conference information to them, keep track of sponsorship payments, coordinate recognition opportunities (signage, verbally throughout conference, on printed materials and in the newsletter after the conference).
- h. Once the Committee has identified exhibitors, follow-up with any exhibitors for the conferences, with FAQ's, hotel facility, set-up and any complimentary registrations as exhibitors.
- i. Provide input to the Committee as needed regarding effective agenda formats, potential speaker ideas, room set up, cost-effective menu options, etc.
- j. Upon receiving direction from the Committee (theme, etc.), coordinate the process of designing, proofing, printing and distributing conference and meetings registration and marketing materials (electronic postcards, save the date, etc.) and posting to the website.
- k. Coordinate processing of registrations and collecting registration fees, including online registrations; run reports for Conference Committee.
- l. Send 30-day notice of Annual Meeting and collect all materials for committee reports, elections, finance and nominating reports.
- m. Prepare pre-, mid- and post-Conference reports as necessary to inform the Board of progress, challenges & needed action items.
- n. Confirm AV provider and collect AV needs from speaker agreement forms.
- o. Coordinate PDI networking receptions.
- p. Manage paid registration and event expenses for any pre or post conference events. (This does not include the soliciting or managing of sponsors, prizes or logistics for said events)
- q. Secure additional general liability insurance and/or events cancellation insurance, including monitoring policy and industry trends related to pandemic, terrorism or evolving issues.
- r. Select menu options, secure meal counts and monitor and enforce guarantees.
- s. Coordinate packing and transportation of PDI materials and equipment to and from conferences.
- t. Monitor sleeping room blocks and secure alternate back-up properties.
- u. Handle on-site operations, member requests and inquiries and hotel/meeting facility logistics.
- v. Coordinate volunteer on-site conference and meeting staffing processes.
- w. Coordinate speaker host assignments and responsibilities for conferences.
- x. Utilize database management to assist in tracking conference and meetings attendance numbers and report numbers to the Board and membership.
- y. Produce name badges, rosters of attendees, signage, confirmations, and invoices and function tickets.
- z. Prepare conference packets, speaker handouts, conference binders, sample press releases, evaluations, etc. Post to website.
- aa. Secure the development of a mobile conference app if needed (app platform/service to be paid by PDI, e.g. Whova).
- bb. Develop and distribute conference scripts to the Board and Conference Committee.
- cc. Work with PDI Board to establish and present any appropriate awards (i.e. Legislator of the Year, Business Retention & Expansion Awards, Honorary Membership, etc.)
- dd. Notify award recipients and order awards including outgoing board plaques.
- ee. Wrap up post-conference activities (reconcile hotel bill, pay bills, tally evaluations and report back to Board and Conference Committee, post handouts to the website, and follow-up with attendee requests).

- ff. File for Certified Economic Developer (CEcD) and Economic Development Finance Professional (EDFP) continuing education credits through the International Economic Development Council (IEDC) and National Development Council (NDC) for qualifying conferences.

5. Membership Support Services:

- a. Provide association management expertise, guidance and strategies on membership recruitment, retention and management based on PDI's membership goals.
- b. Share ideas found to be successful from best practices within the industry.
- c. Support the association with timely responses to requests to support membership recruitment, relationship and retention - within 24 ~ 48 business hours.
- d. Serve as the central point for membership applications.
- e. Provide information and referral services on economic development agencies and programs, regulatory and legislative information, educational opportunities etc.
- f. Maintain membership directory on the PDI website.
- g. Mail or email prospective member packets, including applications, Annual Conference information and personalized emails.
- h. Prepare and mail and email PDI dues statements (three notices).
- i. Receive, record in database and process membership applications and dues payments.
- j. Prior to each Board meeting and as requested, prepare membership reports.
- k. Produce, distribute and secure annual membership renewal data.
- l. Update and maintain PDI membership brochures (printing, distribution, posting on Website).
- m. Staff the Membership Committee to work closely together to develop and implement programs targeted toward membership recruitment and retention.
- n. Coordinate the every other year salary/benefits and member satisfaction survey.

- o. Oversee new member welcome process (email welcome, gather new member profiles for newsletter, etc.)
- p. Coordinate the annual Partners, Process & Profession half day meeting for new economic developers.
- q. Coordinate new member orientation at the PDI conferences.
- r. In conjunction with the PDI Membership Committee, AMP staff will make PDI membership growth the first priority.

6. Public Relations/ Communication Management:

- a. Coordinate PDI display booth presence for events and ensure print materials (brochures, handouts, etc.) are supplied.
- b. Coordinate process of content development, design and distribution of the PDI Post eNewsletter. Utilize a recognized e-platform such as Constant Contact, MailChimp, etc.
- c. Promote twice monthly legislative update webinars during the Legislative session.
- d. Work with PR/Communications (editorial) Committee to collect content including industry related information, new members, scholarship recipients, and upcoming PDI events to publish in PDI Post.
- e. Work with the Legislative Committee and contract lobbyist to collect timely legislative updates to publish in PDI Post.
- f. Forward text for newsletter to vendor for production of electronic newsletter.

- g. Work with PR/Communications Committee to maintain additional distribution contacts related to economic development (i.e. Legislators List) and media list if needed.
- h. Maintain distribution of eNewsletter consistent with timelines established by PDI.
- i. Distribute blast e-mail communications to PDI members as needed (24 hour notice required).
- j. Utilize database management system to provide personalized broadcast email distribution (linked to membership database).
- k. Work with PR/Communications Committee and website provider to ensure timely website updates. This includes understanding the backend website admin application. (Additional fees apply for website vendor and hosting costs).
- l. Work with the PR/Communications Committee to determine content for the Website.
- m. Coordinate posting process and invoicing for job postings.
- n. Update posting of content for all Website pages.
- o. Develop and implement social media strategies to promote and highlight PDI events, educational opportunities and key partners' programming via current/widely utilized tools, e.g., Facebook, Twitter etc.

7. Governmental Affairs Support:

- a. Work with the PDI contract lobbyist and Legislative Committee to coordinate and promote PDI legislative forums and/or events.
- b. Serve in a communications role, assisting the PDI contract lobbyist in distributing legislative information to PDI members.
- c. Provide updated PDI membership list in Excel format to PDI contract lobbyist to be used for distributing legislative information to PDI members.
- d. Connect PDI contract lobbyist with vendor information to design/print Legislative Agenda.
- e. Work with PDI contract lobbyist on distribution of Legislative Agenda.

8. Education Committee Support:

- a. Collect, tabulate, and distribute scholarship requests to Board.
- b. Maintain a running list of scholarships awarded.
- c. Monitor revenue and expenses related to scholarships.
- d. Follow up with reimbursement upon successful completion.
- e. Promote topical educational sessions, webinars e.g., Leadership Lounges, coordinated by the Education Committee members.
- f. Coordinate email marketing of registration information distribution to members.
- g. Accept registrations, enter payments, process credit cards and deposit checks.
- h. Create name badges, roster of attendees, and invoices to those who have not paid
- i. Follow-up with presenter on handouts, key presentation points; practice with technology if needed.
- j. Be present on-site at the audio conference managing technology and audience questions.
- k. For webinars, PDI will continually evaluate and purchase Zoom or appropriate webinar software.

Response Format and Proposal Instructions

Responses must include the following information that will serve as the basis for rating qualifications of the individual/firm in this RFP. PDI will evaluate proposals on the basis of the following information that must be submitted in each response:

1. Provide an executive summary of your approach -- condense and highlight your approach to the contents of the proposal. The summary should provide the PDI Board with an overall understanding of the proposal and the individual/firm's approach tailored to PDI.
2. Provide evidence of the individual/firm's ability to provide association management services, including company background and history.
3. An outline of the individual/firm's credentials and the professional experience of individual staff members— positions held, past clients, etc. Individuals/firms should include resumes or other descriptions of relevant past experience and qualifications of key individuals who will work with PDI.
4. Provide the following information:
 - Identify how you will manage, service and support PDI, and the tools and technologies that will be utilized.
 - Describe your individual/firm's experience with similar clients/associations, including their approximate budget level.
 - Present a detailed process for your services and how those components will benefit PDI.
6. Individuals/firms must list at least three (3) references for similar work completed in the association management market that includes the following information: company name, address and phone number; contact name, title and e-mail; website address (if applicable). PDI may contact the individuals listed to validate the nature of the individual/firm's experience.
7. Fee Structure: Detail the fees associated with providing the detailed Scope of Work and any additional costs that may be associated with fulfilling this scope of work.

Standardized Reporting Structure

- Administrative/General Office & Inventory:
- Board & Committees/Teams:
- Financial Management:
- Conference/Meeting Management:
- Membership Support Services:
- Public Relations/Communication:
- Government Affairs/Support:
- Education:
- Total Proposed Budget for PDI Association Management Services:

Please feel free to elaborate on fee structures, options and additional services that you may feel are relevant to PDI's deliberations, but do include a clear and concise summary of the fees/total outlined above.

8. Please describe your background/knowledge of the profession of economic development and/or how you or your organization plans to develop relevant knowledge over and above working with the Professional Developers of Iowa.
9. All proposals should be submitted as a PDF. Submitted proposals should not exceed 10 printed pages in length – not including resumes or promotional material.

Submission and General Instructions

Individuals and firms responding to this announcement shall submit their proposal by email to james.hoelscher@uni.edu by October 23, 2020. Late proposals will not be accepted or reviewed.

Important Dates & Deadlines

RFP Notice – Open for Submission: **September 29, 2020**

Questions Submitted on the RFP or Process: **No later than Oct. 14, 2020**

Submission Deadline: **October 23, 2020**

PDI Finalist Interviews: **November 5 & 6** (Please hold for in person interviews if it is deemed possible)

Management Announced: **Target Date November 13, 2020**