

**Kansas Society of Association Executives  
Request for Proposal  
Association Management Services**

The Kansas Society of Association Executives (KSAE) is seeking proposals from individuals or firms for the provision of association management services to KSAE.

The following Request for Proposal (RFP) describes the areas of expertise that are sought in support of KSAE meetings, activities and executive/administrative tasks. KSAE seeks to establish a contract with an individual or firm that is experienced in providing professional association management services.

The KSAE Board will conduct an evaluation of submitted proposals and will award a contract to the individual or firm whose proposal is determined to be most advantageous to KSAE considering the factors set forth in this RFP.

The initial contract resulting from the RFP will be effective after approval by the KSAE Board to start on an agreed upon date for a period not to exceed three (3) years. KSAE will determine when it will be appropriate to issue a new RFP for management services or to renew for a successive contract.

**Background Information**

KSAE is the state association representing professionals working in the field of association management. With close to 150 organizational and supplier members representing 330 individuals KSAE is a nonprofit that serves as the state level community of association professionals. KSAE promotes connections and professional growth through meetings, conferences, social activities, seminars and small group meetings. KSAE is transitioning to new management as it seeks to grow the membership and enhance its member service programming.

**Scope of Contracted Work**

The following information describes KSAE's expectations of the awarded contractor's responsibilities, as they relate to providing association management services to KSAE. The selected contractor will report directly to the KSAE President and its Board of Directors. The scope of contracted work includes, but is not limited, to:

### **Executive/Administrative**

- Serve as the Executive Director of KSAE which includes both thought leadership about the future of KSAE and its potential, as well as the management of day-to-day operations
- Assist in the implementation of directives of the executive committee and board of directors
- Assist with annual strategic planning and monitor and report progress on the plan
- Identify site of board meetings and coordinate all aspects, including assisting the president with setting the agenda and providing the board with meeting materials
- Oversee administrative print and electronic files and records, and maintain organizational archives
- As needed, provides support and direction on ad hoc legislation (at the discretion of the KSAE Board) that may affect the industry
- Facilitates events with legislators so they fully understand associations' role
- Maintain passwords, log-in information and other important details for all accounts
- Assist the Board with conducting surveys and assessments, analyzing data and producing reports

### **Public Relations/Marketing/Communications**

- Seek ways to promote the association profession in the general public
- Write/distribute news releases on members and KSAE activities as warranted
- Become actively involved with ASAE and other state SAEs through the Association Society Alliance
- Develop marketing plans/approaches for events and other KSAE activities in order to ensure maximum exposure and participation
- Promote the Certified Association Executive (CAE) program

### **Website, Social Media and Publications**

- Maintain database to ensure that email list and social media accounts are current and accurate
- Serve as webmaster and ensure that all content is accurate and posted in a timely fashion
- Post KSAE news and activities, and other news of interest to KSAE membership on social media
- Maintain calendar of events and ensure that pricing details and registration deadlines are accurate
- Prepare and send out electronic correspondence (emails, announcements, etc.) as needed by the KSAE leadership, Committee Chairs
- Identify, negotiate and maintain current vendor/software contracts in coordination to support
- Communication and publishing activities
- Meet deadlines for and manage the content for the annual membership directory and KSAE magazine

### **Financial/Database Management**

- Manage KSAE's finances in coordination with the volunteer treasurer, maintaining all financial data using Quickbooks
- Provide financial reports as requested by treasurer and board
- Assist treasurer and board with annual budget preparation
- Assist board and committee chairs with identifying and soliciting meeting and event sponsors and ensuring that sponsor entitlements are fulfilled
- Manage accounts payable and receivable
- Invoice attendees, sponsors, and companies, as necessary
- Process money received (checks, credit cards, cash)
- Reconcile bank and credit card statements
- Provide receipts and/or refunds for member activities, upon request
- Prepare information for financial filings
- Make bank arrangements for account signatories

### **Member/Volunteer Support**

- Maintain the membership database in Wild Apricot including addition of new members, renewals, removal of dropped members and job/address/phone/email changes
- Provide reports of membership and other lists as requested by KSAE leadership
- Conduct annual membership renewal/recruitment campaign
- Advise board on recruitment and retention strategies
- Ensure annual committee recruitment process; monitor and report committee activity
- Manage annual volunteer recognition activities
- Manage association member/sponsor relations

### **Meeting and Event Management**

- Manage KSAE's annual conference held in Kansas each year. Conference management includes assisting committee with program development, logistical support, recruiting sponsors, etc.
- Manage KSAE's regular member meetings (estimated eight per year), small groups and committee meetings, social activities (holiday social, happy hours), etc.
- Serve in an advisory capacity to event chairs and association leadership, communicating event logistics to committee/event chairs, members and participants
- Identify and negotiate conference and event site contracts in coordination with KSAE leadership
- Serve as primary point of contact with event venues by providing attendee count, special meal requirements, technology needs by requested deadline
- Secure conference and event exhibitors/sponsors, and coordinate exhibitor and sponsor agreements and required payments
- Assist committee chairs with promoting the annual conference and other events
- Oversee invitations, announcements and updates to conference and other events
- Assist conference and event participants with registration via web and phone
- Manage pre-registration and on-site registration for conference and events, as applicable, which includes the collection of payments
- Prepare registration lists, nametags and materials for conference and other events

- Take photos at conference and other events to post on website, social media and repository.
- Oversee awards events, business meetings, and other special programs within annual conference and other events

### **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. In the review process, KSAE 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 KSAE Board with an overall understanding of the proposal and the individual/firm's approach.
2. Provide evidence of the individual/firm's ability to provide association management services, including company background and history.
3. Provide the following information:
  - a. Identify how you will manage, service and support KSAE
  - b. Describe your individual/firm's experience with similar clients/associations, including their approximate budget level
  - c. Present a detailed process for your services and how those components will benefit KSAE.
4. 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 experience and qualifications of key individuals who will work with KSAE.
5. 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.
6. Individuals/firms may also provide any additional information that may be germane to the proposal and the evaluation of the individual/firm's experience.

### **Submission and General Instructions**

Individuals and firms responding to this announcement shall submit their proposal by email to KSAE Executive Director (cclassi@ksaenet.org) by March 24, 2023.

### **Important Dates Deadline**

RFP Notice – Open for Submission – March 3

Proposal Submission Deadline – March 24

KSAE Search Committee Review and Interviews – March 27-31

KSAE Board Consideration/Approval/Contract with New Management – April 7

New Management Announced – April 14