



## Scope of Work

**Title:** Association Management Company

**Reports to:** AFP Board of Directors of Greater Houston Chapter

In 2018, the Association of Fundraising Professionals – Greater Houston Chapter (AFP-GHC) leadership introduced and implemented a new five-year Strategic Plan focused on significant, dynamic growth, including leadership development, added educational programming, and enhanced member benefits to ensure increased member participation. Historically, the chapter has sought administrative management services by contracting with a specific association management company. After much research, examination, and discussion with numerous and varied key stakeholders, the chapter leadership has decided to move forward with Goal 7 of the chapter’s five-year Strategic Plan. That is, by 2022, AFP-Greater Houston Chapter will have an organizational leadership and volunteer management model that can readily support the expansive membership and programming of the Chapter.

This means the chapter seeks to contract with a qualified company to provide association management services that support AFP-GHC. The chosen company will be a strategic partner to the chapter’s board and the Chapter Manager. The association management company will be the primary administrative support system for the chapter’s daily operations, from member services and programming to administrative support for the board and committees. The association management company should expect and be equipped to dedicate approximately 30 hours per week to AFP-GHC chapter management, with heavier time commitment during event times. The Board of Directors will review the contract annually at the end of the year.

The duties of the association management company will include, but are not limited to, the following responsibilities:

- Chapter Administration
  - Provide a shared telephone line with courteous, friendly, and efficient receptionist services with back-up voice mail (at AFP-GHC expense) during regular office hours.
  - Respond to email inquiries about AFP-GHC and chapter activities in a timely fashion.
  - Update the AFP-GHC website content in a timely manner and support transition to new platform and design in 2019.
  - Manage administrative support for membership, ranging from the maintenance of a current roster monthly to support for member retention.
  - Support chapter events by managing registration process and set-up.
- Board Support
  - Attend all board meetings and offer a consistent scribe to take meeting minutes and submit a draft of the minutes to the chapter Secretary for review, editing, and approval.
  - Have a presence at committee meetings as needed and requested by committee chair or Chapter Manager.

- Provide regular updates regarding event changes, IHQ updates and announcements, and deadlines.
- Handle daily administration of incoming correspondence and forward as appropriate to board or committee members, as well as keep Chapter Manager in the loop.
- Financial Management
  - Oversee primary bookkeeping and accuracy of financial information provided by AFP-GHC Treasurer.
  - Maintain financial records in compliance with AFP IHQ and the IRS.
  - Prepare reports to be presented for board meetings and review by Chapter Manager.
  - Collect all fees, process credit card charges, post payment to the appropriate records, prepare and make bank deposits, as well as manage Accounts Receivable.
- Office Management
  - Provide office equipment necessary for an efficient business office.
  - Provide well-known, common, exportable, importable, software capability such as: Word, Excel, database, financial, and Internet access.
  - Maintain AFP-GHC dedicated telephone line and post office box.
  - Manage central files and storage of materials.

### **How to Apply**

Interested parties should submit a proposal no later than Wednesday, November 28<sup>th</sup> to Jillian Day, Co-Chair of the RFP Review Committee, at the following email addresses: [afpghcjwd2015@gmail.com](mailto:afpghcjwd2015@gmail.com).

Key Points to consider for inclusion in your proposal include but are not limited to:

- Organizational profile including history, staffing, and financial stability.
- Proposal summary and implementation schedule.
- Scope of Work.
- Ability to provide additional options/services not listed above – for example, banking methodologies supported, online services, and marketing of events.
- Cost Proposal. An estimate and/or maximum of fees to be charged and payment schedule based on the RFP description.
- References, to include names, phone numbers and contact people at two organizations who have been your clients during the last 18 months, as well as the size and type of these organizations.

Submissions will only be accepted by email. Only complete applications, submitted by the deadline and meeting the RFP criteria, will be reviewed and respondents invited for final interviews.

An RFP Review Committee of current AFP-GHC board members, leaders and other volunteers will review the applications. In the process of selecting the right applicant, AFP-GHC will review all applications and interview qualified respondents that will lead to a negotiated contract. AFP-GHC will make the final selection based on the best value, past experiences and services offered. Any changes may be negotiated as needed.

The committee will invite selected candidates for a presentation with members of the group on Friday, November 30<sup>th</sup>. Please have some availability that day to meet. Final selection and notification will occur shortly after.

### **Questions About RFP**

All questions concerning this RFP must be submitted in writing via email by no later than Friday, November 16<sup>th</sup>, to Jillian Day at [afpghcjwd2015@gmail.com](mailto:afpghcjwd2015@gmail.com). Responses will be emailed no later than Monday, November 19<sup>th</sup>. Oral responses by any AFP-GHC Representatives are not binding and shall not in any way be considered as a commitment by AFP-GHC.

### **Revisions to RFP**

AFP-GHC reserves the right to change, modify or revise the RFP at any time. Any revision to this RFP will be posted on [www.afphouston.org](http://www.afphouston.org) website. It is the applicant's responsibility to check the [www.afphouston.org](http://www.afphouston.org) website frequently to determine whether additional information has been released.

### **Contract Terms**

Provisions of this RFP and the contents of the successful proposal are considered available for establishment of final contractual obligations for a minimum period of 60 days following the proposal submission. The contract resulting from this RFP will commence as of the date of execution of the contract. The length of the contract will be negotiated by AFP-GHC and the awarded respondent. This is a turn-key operation. AFP-GHC will pay the vendor based on the arrangement agreed upon.

Unless otherwise specified, the successful applicant shall, at its sole cost and expense, procure and maintain or cause to be procured and maintained, in full force and effect throughout the term of the Agreement, required minimum limits of insurance. All insurance shall be procured from reputable insurers authorized to do business in the State of Texas.

At least thirty (30) days prior written notice must be given to AFP-GHC in the event coverage is materially changed, cancelled or non-renewed. The successful applicant will provide Certificates of Insurance evidencing the required coverage at least ten (10) days before work is begun and at least ten (10) days before each insurance renewal date.

The successful applicant shall indemnify, defend and hold harmless AFP-GHC, its employees and agents, from and against any and all losses, costs (including, but not limited to, litigation and settlement costs and counsel fees and expenses), claims, suits, actions, damages, liability and expenses, occasioned wholly or in part by applicant's act or omission or negligence or fault or the act or omission or negligence or fault of applicant's agents, subcontractors, independent contractors, suppliers, employees or servants in connection with the Contract that may result from this RFP. This includes, but is not limited to, those in connection with loss of life, bodily injury, personal injury, damage to property, contamination or adverse effects on the environment, intentional acts, failure to pay any Subcontractors and suppliers, any breach of the Contract, and any infringement or violation of any proprietary right (including, but not limited to, patent, copyright, trademark, service mark and trade secret).

## About AFP-Greater Houston Chapter

### Mission Statement

Association of Fundraising Professionals (AFP), an association of professionals throughout the world, advances philanthropy by enabling people and organizations to practice effective and ethical fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing, and advocacy.

### Vision

By 2022, AFP – Greater Houston Chapter will elevate the fundraising profession, inspire exceptional fundraisers, and advance philanthropic giving.

### Core Values

The Association of Fundraising Professionals – Greater Houston Chapter (AFP GHC) Strategic Plan lays out six core values:

- **Professionalism** – The role of fundraising professionals is an essential, noble pursuit and advances the greater Houston nonprofit community.
- **Learning / education** – The assurance of relevant and high quality educational opportunities for fundraising professionals at all career points and in all staff roles.
- **Ethical fundraising** – Universal adherence to the AFP Code of Ethical Principles and Standards, and assuring that fundraising professionals are informed of ethical fundraising practices and the tenets of the Donor Bill of Rights.
- **Integrity** – Transparency in the management of chapter finances and governance.
- **Fun** – An environment of camaraderie and building bonds between fellow fundraising professionals.
- **Inclusiveness** – Welcoming all fundraising professionals, regardless of employment status, organizational size, or professional position, and encouraging all to become active participants in the chapter.

### Chapter History

The Association of Fundraising Professionals (AFP) represents more than 30,000 members in 230 chapters throughout the world, working to advance philanthropy through advocacy, research, education and certification programs. The association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession. The Greater Houston Chapter was formed in 1969 and boasts a growing membership of more than 600 fundraising professionals making it the seventh largest chapter in the world.

### Board Composition

The AFP GHC Board of Directors is made up of 20 to 30 fund development professionals who volunteer their time and resources to the chapter and to board service. Directors are elected by Chapter membership and serve a minimum of a one-year term. The President Elect, President, and Past President commit three years to board service to ensure streamlined leadership. Committee Chairs are asked to identify and recruit his/her replacement, resulting in a two-year commitment to committee leadership. The Executive Committee is comprised of the President Elect, President, Past President, Secretary, and Treasurer.