

Request for Proposal for Chapter Administration

SHRM Jacksonville – Northeast Florida

February 19, 2018

Organizational Information

Name: SHRM Jacksonville

Geographic Scope: Northeast Florida

Profession Served

SHRM Jacksonville was formed by a group of human resource leaders and personnel specialists who wanted to explore and collaborate on solutions to mutual problems. Their initial interests covered distribution of information, exchange of ideas, development and refinement of professional approaches and procedures & education.

Through the years, SHRM Jacksonville has broadened its membership base to include not only practitioners in human resources, but also consultants and vendors to the profession of Human Resources, educators who teach the next generation of human resource professionals, as well as employees of executive search firms and students.

Today, nearly 650 members express the views of almost every facet of business, both private and public, in Northeast Florida. SHRM Jacksonville is chapter affiliate #0011 of the Society for Human Resource Management (SHRM).

Organizational Purpose

- To promote an understanding of the principles, methods, policies and ethics of human resource management in organizations throughout the First Coast;
- To promote the exchange of ideas and practices and the development of mutual assistance among human resources professionals;
- To contribute to the improvement of techniques and procedures that are essential to the effective conduct of employer-employee relations; and
- To advise and assist organizations desiring to introduce or improve human resource programs.

Governance

President	Tammy Vlah, CRP	Watson Relocation Services
President-Elect	Natasha Slaughter, SHRM-SCP, SPHR	NEx Chapter Media
VP, Programs	Chase Foy	Harden & Associates
Treasurer	Kristi Dennis, SHRM-CP, PHR	The Suddath Companies
Secretary	Julie Fagan	Natural Life
Past President	Chad Sorenson	Adaptive HR Solutions

7 Board Members – Directors:

Certification – Monica Hillin	Legislative – Lindsay Swiger
College Relations – Lanette McKnight	Membership – Keith Fairchild
Diversity – Tanya Harris	Workforce Readiness – Heather Cosgrove
Foundation – Heidi Barfield	

4 Board Members – Chairpersons:

Business Partners – Kim Lambert	Operations – Kim Biehunk-Justiss
Marketing – Kenyon Sutton	Social Media – Shawna Grant

Membership Information

<i>Membership types:</i>	Professional, General, Associate, Student
<i>Organization type:</i>	501(c)(6)
<i>Number of Members:</i>	650 Members
<i>Dues:</i>	Professional-\$50, General-\$50, Associate-\$50, Student-\$0,
<i>Program Year:</i>	April thru March

Committees and Responsibilities

VP, Program: Develops and manages all programs, monthly chapter meetings, workshops and seminars provided by the Chapter.

Membership: Recruits and retains members, solicits volunteers, develops and ensures distribution of the membership directory, and provides hospitality services.

Marketing & Community Relations: Promotes activities to enhance SHRM Jacksonville's recognition and develops sponsorships and marketing opportunities. Seeks out and implements programs and services that benefit the HR community and the community at-large.

Secretary: Manages SHRM Jacksonville's communications, including oversight of bi-weekly News You Can Use e-blast, monthly newsletter, website and marketing communications.

College Relations: Provides activities and programs that focus on those who are new to the profession, including mentoring, college relations and scholarships.

Foundation: Liaison between SHRM Foundation and local chapter, tasked with fund raising opportunities and communication of Foundation scholarships.

Legislative: Provides information and organizes activities to support human resource legislation at the local, state or national level within the human resources community. Aid in planning of midyear Legislative update and annual legal update as well as planning and oversight of annual Supervisor Training.

Workforce Readiness: Monitor and evaluate, on a continuing basis, local activities concerning workforce readiness issues and plans while encouraging chapter involvement with activities impacting the workforce readiness arena.

Diversity: Spearhead the effort to diversity SHRM Jacksonville membership and to publicize successful diversity programs in the community. Create a Diversity event with a dynamic speaker focusing on diversity and inclusion.

Certification: Manage SHRM Jacksonville certification program. Increasing the number of chapter members who are certified by SHRM and HR Certification Institute. Help SHRM Jacksonville members achieve the certification designations and through the recertification process.

Management Company Duties and Responsibilities

The following section outlines the duties and responsibilities that may be awarded under the contract with SHRM Jacksonville.

Board Support

- Support the Nominations Committee and follow-up on details related to the election of officers and directors.
- Update contact information as needed and distribute to all Board members.
- Update SHRM Jacksonville Leadership Handbook as needed and requested.
- Make arrangements for conference calls among Board members as needed.
- Attend Board meetings, via conference call, and contribute as appropriate (for example, to membership survey, to meetings planning, to membership drive initiatives, etc.).
- Attend, in person, the Annual Conference & Expo, help the Conference Chair with managing details, obtain sponsors and handling all administrative tasks.
- Analyze and make recommendations on policies and procedures.

Chapter Administration

- Provide a single point-of-contact for administrative activities for both board and members.
- Provide a telephone-answering system that contains current chapter information, e.g., meetings, membership, with daily checks for messages and meeting registrations. This system should include the option of calls being answered in SHRM Jacksonville's name during normal business hours by an association management company representative assigned to our account. Return calls or redirect inquiries as appropriate.
- Maintain and update telephone-answering system with current meeting information, current membership information, etc.
- Manage incoming mail through the post office box, lock box, etc. Receive and distribute mail to appropriate staff, officers, directors and committee chairs.
- Open e-mail daily and respond to inquiries directly or forward to Board Members. (15-30 messages per day).
- Order name badges for incoming officers and chairs annually.
- For Chapter Meetings, prepare registration list, nametags, and list of new members for each meeting.
- Respond to various inquiries from prospective members, vendors (opportunities to advertise and exhibit), HR professionals searching for jobs, reporters looking for leads and sources, and other chapters looking for ways to publicize their meetings.
- Interface with SHRM on issues such as reviewing SHRM Jacksonville's member roster periodically to compare with SHRM's roster, methods of administration, services, graphic standards, etc.
- Interface and respond to inquiries from other SHRM chapters and other human resource organizations.
- Perform miscellaneous duties as assigned.

Finance and Accounting

- Prepare and transmit monthly financial reports.
- Provide assistance with the development and presentation of an annual budget.
- Maintain accounting systems and procedures in accordance with SHRM Jacksonville policies.
- Maintain and monitor all bank accounts and invest surplus as directed by the Board.
- Perform all bank reconciliations.
- Make all bank deposits.
- Prepare and review returns and schedules for independent accountants. Coordinate annual financial audit.
- Process all checks, purchase orders, credit card payments and refunds for all chapter revenue sources.
- Pay monthly bills.

Membership Database

- Develop and maintain database for capturing information about members, meeting attendees, sponsors and potential advertisers, membership prospects, former members, etc.
- Create queries and reports on regular or as-needed basis, e.g., retention lists, sorts of membership data, new members, etc.
- Develop and maintain prospect database.
- Update member information as received.
- Follow-up with individuals to obtain current addresses or other information where necessary.

Membership Interfaces and Transactions

- Respond to various inquiries from current and prospective members and provide information as necessary.
- Send membership applications to Membership Director review and approval.
- Process approved membership applications received Membership Director.
- Invoice members for annual dues.

Storage and Archives

- Maintain original and back-up files of all computer records, data, etc.
- Retain appropriate archival material each year.

Website. *Website administration, management and updates and/or directing a third-party vendor to perform such activities.*

- Receive, review and edit job description information.
- Update index, calendar, and events pages as required.
- Update or change other sections of website as appropriate (membership information and application, officer listing, committees and chairs, professional development seminars and registration forms, comp survey information and forms, etc.).
- Respond and/or route incoming emails to the appropriate party.

Information Requested of Management Company

Please note the following minimum guidelines for all responses to this invitation for proposals:

- The Management Company shall be paid a set monthly management fee, based on agreed upon services. For purposes of this proposal, please provide a separate fee structure for each of the following:
 - Board Support & Chapter Administration Only
 - Entire scope presented above
- Describe the Management Company's history, background, general qualifications, mission, business philosophy, goals and purpose.
- Provide information on the firm's management portfolio, including the following:
 - Number of clients served along membership and budget size
 - Other human resource organizations and SHRM chapters managed
- Provide the names and background of proposed representatives, including resumes. All key personnel assigned shall be subject to SHRM Jacksonville approval. Provide client references and telephone numbers for both the firm and proposed staff.
- Provide turnover information for management and administrative staff. Describe the method and frequency for training key personnel as well as the Management Company's process for evaluating performance.
- Describe the Management's Company's plan to ensure a smooth and timely assumption of responsibilities from the current chapter administrator. Also describe any transition costs involved.
- Provide insurance, bond information and bank references.
- Provide sample financial management and budget reports.
- Describe the firm's office equipment and software (including database) utilized.
- Provide information on any awards or recognitions received.
- Provide the firm's latest annual report.
- Present any other pertinent information that would be helpful in SHRM Jacksonville's selection process. Details, specificity and creativity are encouraged. On-site interviews will be required of finalists.