



**Association Management Firm
Request for Proposal
October 11, 2024**

The Association of Fundraising Professionals of Chicago (AFP Chicago) seeks a strategic partner to provide comprehensive management services that will support our organization in operating sustainably and planning for future growth. Our vision is to lead a vibrant, diverse learning community of fundraising professionals who, by employing fundraising best practices, advance generosity and positive social change to improve and enrich lives in the greater Chicago area. We seek a partner who shares our passion for innovation, leadership, and a commitment to long-term success to achieve this mission. Together, we aim to ensure that AFP Chicago is positioned not only to meet the challenges of today but to thrive for years to come.

Our management partner must demonstrate a commitment to excellence in service by providing meticulous attention to detail, exceptional project management, and prompt, clear communication. These qualities are essential to effectively supporting and empowering our volunteer board members. We seek a partner who will:

- Demonstrate a commitment to always act in alignment with the Vision and Mission of AFP Chicago.
- Thoughtfully communicate news and engagement opportunities to both our membership base and non-members who benefit from AFP Chicago's educational and networking programs.
- Effectively track data and utilize results to strategize and promote activities that engage members and non-members alike.
- Continue fostering an inclusive and diverse Board, volunteer community, membership, and partnerships.
- Maintain a high level of accountability, transparency, and communication between the Board and management, ensuring clear and consistent support.
- Play an active role in the cultivation and stewardship of partners and donors to deepen their engagement.
- Bring professionalism and creativity to discussions that propel AFP Chicago toward success and goal attainment.
- Preserve AFP Chicago's reputation for hosting valuable education, ensuring the chapter remains competitive in the local nonprofit landscape as a trusted association for programming and content.
- Strive to be a trusted source that inspires and moves people with innovative ideas, while having the operational capacity to turn these ideas into actionable steps that elevate philanthropy in Chicagoland.

AFP Chicago History

AFP Chicago traces its roots to the mid-1950s when it was established as the Chicago Society of Fund Raising Executives (CSFRE). At that time, it operated independently, as no national umbrella organization existed. In the 1970s, Don Campbell played a pivotal role in founding the National Society of Fund Raising Executives (NSFRE), leading CSFRE to become one of the first local chapters of this new national association. When NSFRE later evolved into the Association of Fundraising Professionals (AFP), our chapter adopted the name AFP Chicago, continuing our legacy of leadership and commitment to the fundraising profession.

The Association of Fundraising Professionals (AFP) empowers individuals and organizations to engage in ethical fundraising through education, networking, research, and advocacy. AFP Chicago fulfills this mission by serving as a thought leader for fundraising professionals in the Chicago area. We provide access to high-quality education, professional development resources, and networking opportunities, connecting diverse professionals across sectors, career stages, and specialties. AFP Chicago fosters meaningful dialogue, encourages innovative thinking, and shares knowledge and best practices to promote effective and ethical fundraising throughout the region.

AFP Chicago Vision Statement

Our vision...to lead a vibrant, diverse learning community of fundraising professionals who, using fundraising best practices, advance generosity, and positive social change to improve and enrich lives in the greater Chicago area.

Our chapter's strategic plan, developed in 2016-17, played a pivotal role in reshaping how we serve our members, with a strong emphasis on Inclusion, Diversity, Equity, and Access (IDEA). As we are now overdue for a comprehensive update, we plan to begin laying the foundation for a new strategic plan in 2025. Subject to budget considerations, we may engage an external consultant to guide this process, ensuring the updated plan aligns with the evolving needs of our members and positions the chapter for continued growth and impact.

Relationship to Other Related Organizations

AFP Chicago is a chapter of the Association of Fundraising Professionals (AFP Global), the premier professional organization for individuals responsible for generating philanthropic support across the nonprofit and charitable sectors. Established in 1960 and headquartered in Arlington, VA, AFP Global represents over 30,000 members in 230 chapters worldwide. The organization is dedicated to advancing philanthropy through advocacy, research, education, and certification while fostering the development and growth of fundraising professionals and upholding the highest ethical standards in the profession.

AFP Chicago Chapter is currently managed by Chicago Association Management, which will be considered as an eligible candidate for contract renewal as part of this RFP process.

Membership Make-Up

AFP Chicago serves a diverse membership of over 600 individuals representing more than 500 organizations across the Chicago area. In addition to our members, our communications and programs reach a broader network of nearly 6,000 fundraising professionals. AFP Chicago offers various membership options through AFP Global, with our largest categories including Professional, Young Professional, and Organizational memberships. Our members represent a wide range of roles within the nonprofit sector, including senior leaders, fundraising team members, and sole fundraisers for their organizations.

Leadership and Committee Structure

AFP Chicago is governed by a Board of Directors comprising up to 35 elected members, with 23 currently serving. These individuals are responsible for overseeing and guiding the chapter's business, property, and affairs in alignment with the strategic plan, policies and procedures, Articles of Incorporation, and Bylaws. The Board ensures that the chapter remains focused on its mission and goals.

The Executive Committee, which leads the Board, is composed of the chapter's officers, including the President, President-Elect, Immediate Past President, and Vice Presidents for Continuous Learning, Member Engagement, Resource, and IDEA (Inclusion, Diversity, Equity, and Access), along with the Secretary and Treasurer.

Further leadership and support are provided at the committee level by board members and member volunteers. Each committee is led by a chair or co-chairs and is overseen by a member of the Executive Committee. Committees meet regularly as needed to support the chapter's initiatives and strategic priorities. In 2024, the committees include Audit, Chapter Fellows, Continuous Learning Council, Committee on Directorship, IDEA, Philanthropy Awards Luncheon, Member Engagement, Peer Mentoring, and Resource Development.

Communications

AFP Chicago communicates regularly with its members and the broader fundraising community via email and maintains an active presence on social media platforms, including Facebook, X (formerly Twitter), and LinkedIn. Our email communications to members and the public include a variety of content such as the chapter newsletter, event announcements, program surveys, event reminders, and application deadline notices. The chapter also operates an online jobs board, which generates revenue and provides bi-weekly email updates featuring current job opportunities for members. Additionally, we offer online advertising opportunities to further engage with the community.

Meetings and Events

AFP Chicago offers a range of educational and networking opportunities throughout the year, with events designed to engage fundraising professionals and related stakeholders from across the Chicago area. These events vary in format, including in-person, hybrid, and virtual options, allowing for greater flexibility and participation.

Current events include:

- Bi-monthly meetings of the Board of Directors
- Bi-monthly Executive Committee meetings (with additional meetings as needed)
- Monthly committee meetings (with additional meetings as needed)
- Bi-monthly educational programs
- Annual Meeting of the membership
- Annual Philanthropy Awards Luncheon
- Affinity Group meetings and socials (six groups meeting multiple times per year), including: African American, Asian/Pacific Islander, Latinx, LGBTQ+, Neurodiverse, and White Fundraisers Advocating for Racial Equity (WFARE)
- "Third Thursday" Networking events (six-seven per year)

Summary of Contracts

In addition to our partnership with Chicago Association Management, AFP Chicago occasionally contracts with auditors on an as-needed basis. We also engage in contracts for event production assistance, venues, and strategic planning services. Looking ahead to 2025, we plan to contract a dedicated event planner to manage our signature event, the Philanthropy Awards Luncheon, as part of our ongoing efforts to ensure the success of this key annual event.

Scope of Work

Core competencies required of a management services firm working successfully with AFP Chicago include a commitment to service excellence, demonstrated by strong customer service, proactive initiative, effective planning and organization, integrity, and an unwavering focus on quality. AFP Chicago seeks a firm that excels in:

- **Timeliness:** Delivering services and meeting deadlines with efficiency and reliability.
- **Effective Project Management:** Coordinating and managing tasks with precision, ensuring smooth operations and successful outcomes.
- **Strong Communication:** Maintaining clear, consistent communication with AFP Chicago's volunteer leaders, staff, and stakeholders, ensuring alignment and transparency.
- **Customer Service Approach:** Providing exceptional service to our volunteer leaders, showing responsiveness, attentiveness, and professionalism at all times.
- **Strategic Proactivity:** Anticipating AFP Chicago's needs by understanding our calendar of activities and mission, and taking initiative to plan ahead, rather than merely reacting to requests.

AFP Chicago seeks a firm that will embody these competencies while providing the services listed below.

Administrative

- Permanent association mailing address with office space and equipment to perform scope of services
- All necessary email addresses, phone and fax numbers, and voice mail system for after-hours calls
- Administrative support for AFP Chicago projects and initiatives
- Telephone services with calls answered in the name of AFP Chicago
- Facilitation of regular communications between management, AFP Chicago Chapter Leadership, and AFP Chicago members
- Knowledge management systems for policies, procedures, minutes, and committee materials
- Provide and maintain a conference call/video conference account
- Operations during standard business hours except for designated holidays

AFP Global Relations

- In collaboration with AFP Chicago Board Leadership, serve as consistent contact with AFP Global
- Communicate information from AFP Global to the Board of Directors as needed
- Submit all filings for annual Accord, Ten Star, and IDEA Champions per AFP Global deadlines
- Provide AFP Global with names of volunteer leadership and changes to volunteer leadership as soon as changes occur
- Provide local database changes to AFP Global through whatever method is dictated by AFP Global
- Learn to use AFP Global's "Membership Central" web-based reporting function, providing Board members access as needed, and adapt to any new database systems implemented by AFP Global, including managing challenges associated with system rollouts
- Follow the current AFP procedure for reconciling the local membership database with monthly payment reports from the Global office

Financial Management

- Responsible for financial and statistical data collection, analysis, and reporting: events, membership, job bank, revenue sources, expense categories, investment and income accounts
- Prepare and distribute monthly financial statements
- Handle invoicing, receivables, and payables including those related to monthly job postings
- Maintain accounting ledgers, operations checkbook
- Track finances relative to budget and develop actionable financial reports
- Prepare budgets, working with Treasurer and Executive Committee
- Manage cash flow and association reserves in accordance with AFP Chicago policies
- Coordinate triannual, independent audit or financial review

- Ensure compliance with Internal Revenue Code 501(c)(6) and Unrelated Business Income Tax (UBIT) regulations, including filing tax returns, and advise on the feasibility of obtaining Illinois tax-exempt status.

Member Recruitment and Retention and Membership Database

- Oversee the distribution and collection of membership volunteer interest forms and provide them to the appropriate volunteers in a timely manner
- Maintain the AFP Chicago membership database. Update the AFP Chicago database accurately and in a timely manner with membership reports of active, new, lapsed, and transferred members
- Accurately maintain and update membership records, working with AFP Global on membership processing and renewals in a timely manner
- Provide monthly reports of membership and other lists as requested by AFP Chicago leadership with a particular focus on nonmembers who attend events
- Be a thought partner for and assist with conducting membership renewal/recruitment activities
- Advise board on recruitment and retention strategies
- Produce and distribute all member correspondence including letters, reports, announcements, and invitations as requested by the Board and committee members
- Manage all aspects of the annual Board nominating process and Chapter Board elections

Board Support

- Ensure all Chapter By-Laws of the Association of Fundraising Professionals Global are adhered to and followed to maintain AFP Chicago's Charter
- Collaborate with the board to identify emerging external or internal factors that may affect the efficient and effective operations of the board and the chapter members
- Ensure the board is kept informed and able to make timely decisions by managing internal staff activities
- Assist the President with the preparation and distribution of the agenda and materials for all executive committee and board meetings and coordinate either virtual meeting setup or in-person accommodations
- Assist with scheduling board and committee meetings, sending invitations, and managing RSVPs to ensure timely communication and participation
- Maintain a high level of interaction and communication with the executive committee to foster a collaborative spirit to resolve concerns with innovation and cooperation
- Manage the administrative support to the board to allow for efficient execution of board decisions
- Attend all executive committee, board, and committee (as needed) meetings to ensure that clear communications, minutes, and a seamless execution of chapter activities are performed
- Work with the Committee on Directorship to ensure nominations to the Board are timely broadcasted to the membership, collected, and submitted to the committee to present a Board Slate for a membership vote
- Manage all aspects of Board orientation and surveys at year-end
- Provide a monthly, high-level executive summary of chapter activities to the executive committee
- Assist with the Be the Cause fundraising effort

Committee Support

- Attend committee meetings as needed and assist with budgetary issues, including preparing reports and recording statistics
- Maintain the calendar of all committee activities, schedule meetings, and provide or secure meeting locations
- Assist with specific services for committees as needed to keep committee members actively engaged
- Assist committees and other volunteer groups with information on policies and procedures to conduct their work

Programmatic Event Support

- Plan all necessary logistics, menus, audio/visual requirements, meeting room requirements, contract negotiations with venues, vendors, etc. (Chapter CLC committee members are responsible for program content and speakers)
- Provide staff support for all events where attendance is expected to exceed 40 participants, the budget is \$500 or more, or the projected revenue is \$500 or greater
- Provide data as needed by committees (including membership data, attendance, and financial data)
- Provide registration processing, including name badges and attendee lists
- Provide necessary staffing for on-site registration and event management
- Arrange for a Chapter table at the events to include display notices, volunteer forms, membership information, and any other appropriate information and materials
- Reconcile event revenue and expenses
- Track attendance, prepare and submit a final report for each event
- Process content from event Chairs for the monthly newsletter
- Send follow-up solicitations to all non-member attendees and acknowledgments to sponsors and donors

Communications and Marketing

- Make recommendations and improve the quality and professionalism of all AFP marketing materials and communication channels
- Manage the AFP Chicago website, ensuring content is current and relevant to members, nonmembers, and the Chicagoland philanthropic community
- Manage an active, creative social media presence to promote chapter membership and events, engage and build upon the AFP Chicago community, and create shareable content for AFP Board and Committee Members, such as customizable draft posts, to amplify our message and reach
- Prepare and send electronic correspondence and promotions as needed by chapter leadership and committee leadership, including monthly eDevelopments
- Work with chapter and committee leadership to manage event timelines and ensure deliverables, supporting volunteers with correspondence as needed
- Maintain a calendar of events and ensure that pricing details and registration deadlines are accurate
- Create operational infrastructure to effectively manage the flow of information among the Board of Directors, volunteer committees, and staff
- Create a digital fluency across AFP Chicago, working with staff, volunteers, and other stakeholders to build a culture of digital impact across the organization
- Oversee reputational risk assessment and mitigation options for the Chapter
- Ensure that key stakeholder groups have accessible and timely methods to give and receive feedback
- Work with key stakeholder groups to collaborate and leverage brand strength across the AFP Chicago community, and to create a culture of collaboration and effective integrated workflow across the Chapter
- Create and maintain editorial and promotional calendars. Develop content and publish event marketing, invitations, and collateral
- Use the database to aggressively market to member and sponsor prospects
- Maintain all email service/email correspondence and survey mechanisms
- Manage all aspects of the AFP Chicago Chapter online Job Source

Resource Development, Donor and Sponsor Stewardship

- Collaborate with the Philanthropy Committee to develop an Annual Development Plan that strengthens chapter fundraising efforts, fosters relationships with chapter sponsors and donors, and drives revenue growth.
- Work with the Board to identify and solicit appropriate sponsors for the Chapter and maintain the sponsorship database in collaboration with volunteers. This may include support with prospecting, grant and proposal preparation, and follow-up, while relationship management will be led by volunteer leaders
- Work with volunteers to steward individual, corporate, and foundation donors by ensuring timely pledge reminders, processing gifts, acknowledging contributions, providing accurate name and logo recognition, and meticulously monitoring and fulfilling other promised benefits.
- Maintain database records for donors as they move through the donor cycle

Annual Performance Metrics

The following metrics are examples of the types of performance indicators AFP Chicago tracks to assess success. The Board of Directors will collaborate with the association management partner to define specific metrics and success criteria together. AFP Chicago maintains a dashboard with key performance indicators (KPIs) and additional metrics on Inclusion, Diversity, Equity, and Access (IDEA) principles, and we welcome guidance on best practices for KPI development and tracking.

- Membership: Achieve a renewal rate of 75% or higher.
- Membership: Target an overall growth rate of 2.5% or more.
- Membership: Respond to member inquiries and concerns within one business day.
- Budget Management: Keep total expenses within 10% of budget projections.
- Budget Management: Meet or exceed budgeted revenue goals.
- Educational and Networking Events: Increase overall participant growth by 5% or more.
- Educational and Networking Events: Maintain or reduce event expenses without compromising quality.
- Administration: Schedule, prepare, and distribute meeting materials to committee members at least five business days before the meeting.
- Administration: Provide staffing support for meetings, including managing conference calls and documenting minutes.
- Administration: Ensure timely follow-up on action items from meetings.
- Administration: Maintain clear and consistent communication across committees.

Payment

Payment will be made to the proposer selected on a monthly basis.

Proposal Submission

Each proposal will include a Cover Page, Proposal Narrative (no more than six pages), References, and Budget. Convert all documents to PDF and combine in one file and submit to: Carlos Trejo, President, AFP Chicago at trejoc@protonmail.com.

Cover Page

Proposer's Name

Contact Name and Title

Address, Email and Phone

Proposer website address and social media handles

Proposal Narrative

Please describe your firm's experience and approach to providing association management services, addressing each heading in the Scope of Work and demonstrating how your team will meet or exceed AFP Chicago's performance standards. Each proposal must include:

- A description of your firm's experience with clients and associations of similar size and scope, including their approximate budget level.
- A statement of your firm's commitment to Inclusion, Diversity, Equity, and Access (IDEA), including details on the composition of your team, how IDEA is embedded in your business practices, and how these principles will be applied to this work.
- An outline of how you will manage, service, and support AFP Chicago, with a specific focus on engaging volunteer leadership, utilizing technology effectively, and ensuring operational excellence.
- A detailed process for delivering your services and the measurable benefits these components will bring to AFP Chicago.
- A description of your firm's financial acumen and strategies to ensure AFP Chicago remains financially sustainable, including your ability to manage budgets and maintain fiscal responsibility.
- A demonstration of how your firm will uphold AFP Chicago's standard of excellence, with examples of how you have successfully maintained high-performance levels for other clients.
- Any additional information relevant to your firm's qualifications and the evaluation of your proposal.

References

On a single page, provide the contact information, including the specific contact person, for up to three references who can speak to your firm's experience in association management or other relevant experience related to this RFP.

Budget

On a single page, provide a detailed budget outlining the costs for the proposed association management services. This should include all fees associated with the tasks outlined in the Scope of Work, as well as any additional costs that may be incurred to fulfill the scope of work.

In addition, please provide details on your firm's contract renewal process, including any policies regarding fee adjustments for subsequent years or contract extensions. Specifically, indicate whether your firm has any limits or caps on percentage increases in fees for future contract renewals. Transparency around future cost adjustments is important as we plan for long-term sustainability.

Proposals must be received by 12:00 pm on October 28, 2024.

Proposal Evaluation

Proposals will be evaluated as follows:

<u>SECTION:</u>	<u>POINTS:</u>
Proposer's Experience and Approach	25
Budget	25
Responsiveness to Scope of Work:	
• Administrative & Financial	10
• Board & Committee Support	10
• Membership Management	10
• Marketing/Communications	10
• Event Support	10
<i>Total:</i>	<i>100</i>

Selection Process and Timing

At its sole discretion, AFP Chicago may choose to meet with proposers as part of its selection process. As needed, proposer meetings will take place between November 4-8, 2024. A final decision will be announced no later than December 1, 2024. Please note that AFP Chicago may request partial services in December 2024 to facilitate onboarding and ensure a smooth transition for the full contract to begin in January 2025.

IMPORTANT DATES

<u>IMPORTANT DATES</u>	<u>DEADLINE</u>
• RFP Notice - Open for Submission	October 11, 2024
• Proposal Submission Deadline	October 28, 2024
• Conduct Interviews	November 4-8, 2024
• RFP Committee Presents Top Proposals to AFP Executive Committee	November 15, 2024
• Top proposal presented for approval by AFP Chicago Board of Directors	November 22, 2024
• Contract to Begin	January 1, 2025

At its sole discretion, AFP Chicago may choose not to select any of the proposals submitted.

All inquiries regarding this proposal should be directed to: Carlos Trejo, President, AFP Chicago at trejoc@protonmail.com. No calls, please.