



Request for Proposal for Administrative Services

The NW Ohio Chapter of the Construction Financial Management Association (CFMA) is seeking proposals from qualified contractors to perform the duties of a Chapter Administrator.

The NW Ohio Chapter of CFMA was founded in 1992 and is operated independently by the chapter's Board of Directors under a charter agreement with the Construction Financial Management Association, headquartered in Princeton, NJ. The membership of the chapter is currently 76 members.

The Chapter Administrator will provide administrative services to the NW Ohio Chapter, a detailed list of duties is attached. The Chapter Administrator will be required to work an estimated 10 hours per month; some months will be more, some months will be less.

To be considered, answers to the following questions must be included in your proposal so that we may have a better understanding of your capabilities and the likelihood that you can offer the breadth and scope of services we seek. Feel free to include supporting material.

General Background

Please provide answers to the following questions in your proposal.

- Are you familiar with CFMA? If so, please explain.
- What construction trade association experience do you have, if any?
- Please provide a list of current clients and a short description of the work you provide for them.
- Please list three client and/or professional references.
- Are you willing to sign a non-disclosure agreement regarding use of member information?

Administration

- What is the budget amount and membership total of the largest client you've served?
- What is the budget amount and membership total of the smallest?
- Please detail your experience in database management.
- Please detail your experience in billing and collections.
- Please describe your experience/computer capabilities.

- What kind of computer hardware and software programs do you own and operate?

Association Management

Briefly describe your professional background as it relates to duties outlined.

- Have you had experience managing an association the size of CFMA? If yes, please explain. If no, please detail how your qualifications match the outlined duties.
- Please describe your experience in managing meetings and/or conferences such as seminars and social events.
- Please describe your experience in collateral production and marketing activities such as email blasts, web site, social media, press releases, etc. Include examples if available.
- If you were to accept this contract, what skills/tools would you need to acquire to meet the requirements outlined on the previous page?
- Who, specifically, would be providing the services requested? Please provide resumes/bios on these individuals, including education and training, along with some of their notable accomplishments working for similar clients.

Compensation

The expected monthly hourly requirement for administrative services is shown on the attached. Please include the compensation you are seeking for providing these services in your proposal.

Responses

To respond to this Request for Proposal, email your proposal to:

Pamela Hepburn CCIFP
NW Ohio Chapter Secretary
phepburn@ocpcoc.com

Proposals must be received by August 31, 2018 to be considered.

Selection will be completed by September 30, 2018



Chapter Admin

The Chapter Admin has two primary responsibilities. Communication on behalf of the chapter, and support of the volunteer board, committees and task forces as needed.

The Chapter Admin must be able to communicate both in writing and verbally in a concise and professional manner. The position requires competency using word processor, spreadsheet, powerpoint and social media. The Chapter Admin will use the chapter's email address and accounts in Hootsuite, Addmi, Mail Chimp, Drop Box and Survey Monkey. Experience using these tools is helpful but not required. Marketing experience is helpful but not required.

Chapter Administrator will provide their own computer, internet access and word processing, powerpoint, and spreadsheet software.

▶	Correspondence	Monitor chapter email and social media for inquiries and respond appropriately	Daily
▶	Maintain chapter website	Update content and event information	Monthly
▶	Maintain chapter's social media presence	Post relevant information at least once weekly to facebook, twitter and linked in accounts. Curated articles, meeting and event notices, pictures from events etc	Weekly
▶	Job Bank	Maintain a job bank, email openings to members and post open jobs to website	As Needed
▶	Maintain Chapter Member Lists	Keep member list and contact info current in Mail Chimp and Addmi	Monthly
▶	Maintain a member prospect list	Add guest information to list and add to Mail Chimp for notices	Monthly
▶	Compile and distribute chapter newsletter	Collect updates from officers, distribute in NW OH branded format using MailChimp to members and prospective members	Quarterly
▶	Meeting and Event Notices and Reminders	Send meeting and event notices and reminders using Mail Chimp to members and prospects and notify the Blade in time to publish in monthly Calendar section.	Monthly
▶	Attendee Check In	Check in attendees, hand out name tags or print for guests, give CFMA Membership info to guests. (Bring nametags to meetings) Take pictures at events and post to website, social etc.	monthly meetings and any special events
▶	Meeting and Event Preparation	Set up event in Addmi, Maintain list of registrants for meetings and events and report number to venue and prepare attendee list for membership chair, touch base with speaker regarding AV needs, approve venue's invoice compared to actual attendees.	monthly meetings and any special events
▶	Marketing	Coordinate material for marketing as needed	As Needed
▶	Calling	Follow up with members on meeting rsmps and renewals	Annually and as requested by committee chair
▶	Other Admin	Work with President to prepare required submittals for CFMA Headquarters	April and February
▶	Committee Correspondence	At the request of committees, send correspondence to members or other lists as needed.	As Needed

Highlighted tasks are "secondary" and may be requested if budget permits and board approves.