



AFP Chicago
Association Management Firm
Request for Proposal
September, 2020

The Association of Fundraising Professionals of Chicago (AFP Chicago) seeks comprehensive management services to help achieve our dedicated 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. To achieve this inspiring vision, we seek the similar enthusiasm and leadership from the organization which we entrust to manage the journey with AFP Chicago. Our management partner must support our efforts effectively by:

- Exemplifying a commitment to always acting for the benefit of the Vision and Mission of AFP Chicago
- Thoughtfully communicating news and engagement opportunities to our membership base as well as non-members who benefit from the educational and networking programs of AFP Chicago
- Effectively tracking data and utilizing results to strategize and promote activities to members and non-members
- Continuing our work in developing an inclusive and diverse Board, volunteer community, membership and partnerships
- A high level of accountability, transparency and communication between the Board and our partners
- A high level of involvement in cultivation and stewardship that will enable engagement of our partners and donors
- Bringing a professionalism and creativity into our discussion which will help to move AFP Chicago forward and attain success in reaching goals
- Maintaining the chapter's proven track record to host and provide valuable education and continue being competitive within the Chicago community landscape as a trusted association for programming and content.
- Striving to be a trusted source that will move and inspire people with innovative ideas; with the ability to implement these agreed upon ideas into actions to help elevate the culture of philanthropy in Chicagoland.

AFP Chicago History

AFP Chicago began as the Chicago Society of Fund Raising Executives (CSFRE) in the mid-1950s. It was a captive organization (not a chapter as a national umbrella organization did not exist yet.) In the 1970s, Don Campbell was instrumental in the creation of the national association NSFRE (the National Society of Fund Raising Executives) and CSFRE became one of the early chapters. When NSFRE became AFP, the chapter changed its name again to AFP Chicago Chapter.

AFP Chicago Mission

The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy. **AFP Chicago** delivers on this mission by serving as a thought leader in service to Chicago-area fundraising professionals and providing access to relevant education and training, professional development resources, and networking opportunities. AFP Chicago brings together diverse professionals from across sectors, career levels, and specialties. AFP Chicago fosters dialogue, inspires innovative thinking, and shares knowledge and best practices towards effective and ethical fundraising in Chicago.

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 was drafted back in 2016-17 and directed our leadership to a significant change in how our members are served, in particular from an Inclusion, Diversity, Equity, and Access (IDEA) lens. We will look to refresh the document in 2021 and, depending on budget, possibly engage a third party to assist in the process.

The current plan can be found here: [AFP Chicago Strategic Plan](#)

Relationship to Other Related Organizations

AFP Chicago is a chapter of the larger membership Association of Fundraising Professionals (AFP Global). AFP Global is the leading professional association of individuals responsible for generating philanthropic support for a wide variety of nonprofit, charitable organizations. AFP Global headquarters is located in Arlington, VA. Founded in 1960, 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 AFP Chicago Chapter is currently managed by Williams Management Resources.

Membership Make-Up

AFP Chicago serves over 600 members representing over 500 organizations—and our communications and programs reach a much larger audience of nearly 6,000 development professionals. Through AFP Global, individuals can engage with AFP Chicago through multiple membership options. Our three largest membership categories are Professional 64%, Young Professional 18.3% and Organizational (small and large) 14.5%. Per our 2020 membership survey, 32.05% of members identify as a Chief Development Officer, 24.36% identify as fundraising team members, 23.08% identify as other, 14.10% manage a fundraising team, and 6.41% are the sole fundraiser for their organization.

Leadership Structure

AFP Chicago is led by the Board of Directors, consisting of up to 35 individuals elected by the members of the chapter. These individuals govern, manage, supervise, and control the business, property, and affairs of the Chapter consistent with the strategic plan, policies and procedures, Articles of Incorporation, and Bylaws for the chapter.

The Executive Committee of the board is composed of the board's officers: President, President-Elect, Immediate Past President, Vice Presidents (Continuous Learning, Member Engagement, Resource, and IDEA), Secretary, and Treasurer.

Further leadership and support are provided at the committee level by board members and member volunteers. Committee leadership is provided by a chair or chairs and overseen by a member of the Executive Committee. All committees meet regularly as necessary. In 2020, committees include: Audit (4 members), Chapter Fellows (3), Chapter Continuous Learning Council (23), Committee on Directorship (5), IDEA (10), Philanthropy Luncheon/National Philanthropy Day (30), Member Engagement (7), Peer Mentoring (15), Philanthropy/Resource Development (3).

Communications

AFP Chicago communicates regularly with members and the larger fundraising community via email. Additionally, the chapter maintains a social media presence on Facebook, Twitter, and LinkedIn. Email communication to members and the public includes, but is not limited to: Chapter e-newsletter, notices of upcoming events, program surveys, event reminders, and notice of application timelines. The chapter also maintains and manages an online jobs board with budgeted annual revenue of \$48,000. An email with the current job opportunities is mailed to members bi-weekly. Additionally, online advertising revenue is budgeted at \$3,000.

Meetings and Events

AFP Chicago hosts a number of educational and social events throughout the calendar year. These events range from intimate round table discussions to large conferences for hundreds of Chicago area fundraisers and those connected to the field.

Current events include (all virtual since March, 2020):

- Bi-monthly meetings of the Board of Directors
- Bi-monthly Executive Committee meetings (may meet more frequently as needed)
- Monthly committee meetings (may meet more frequently as needed)
- Bi-monthly educational programs - 118 avg attendees
- Annual Meeting of the membership - 120 avg attendees
- Annual Philanthropy Awards Luncheon / National Philanthropy Day - 750+ avg attendees
- Affinity Group meetings and socials (Five groups meet 3+ times per year)
- Monthly Third Thursday Networking events - 50 avg attendees
- Bi-monthly pop-up, topic-based events throughout the year - 10 - 25 avg attendees

Summary of Contracts

The only current contract outside of Williams Management is the chapter's auditors (\$5,000). Additionally, we periodically engage in contracts for event production assistance, venues, and strategic planning work.

Scope of Work

Core competencies of a management services firm working successfully with AFP Chicago include customer service, initiative, planning and organizing, integrity, and focus on quality. AFP Chicago seeks a firm that will provide the services listed below.

- Permanent association mailing address with office space and equipment to perform scope of services
- All necessary email addresses, phone and fax numbers, 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, committee materials
- Provide and maintain a conference / video conference call account
- Operations during standard business hours except for designated holidays

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 membership 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
- Work with the Board to identify and solicit appropriate sponsors for the Chapter and maintain the sponsorship database in collaboration with volunteers
- Manage all aspects of the annual Board nominating process and Chapter Board elections
- Manage all aspects of the AFP Chicago Chapter online Job Source
- Assist with the Be the Cause fundraising effort

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
- 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 and provide Board members access on an as-needed basis
- 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 Chicago AFP policies
- Coordinate annual, independent audit
- Ensure compliance with Internal Revenue Code 501 (c) (6) and UBIT (Unrelated Business Income Tax) matters and file tax returns

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 which may affect the efficient and effective operations of the board and the chapter members
- Manage all internal staff activities to ensure the board is kept current to make informed and timely decisions
- Assist the President with the preparation and distribution of the agenda for all executive committee and board meetings and coordinate either virtual meeting set up or in-person accommodations
- 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

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, 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

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)
- Staff all events with at least one representative when attendance is expected to be 40+; Budget at \$500+; and/or Revenue of \$500+

- 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
- Provide 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 acknowledgements 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
- Prepare and send electronic correspondence and promotions as needed by chapter leadership and committee leadership, including monthly eDevelopments
- 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 between 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

Resource Development, Donor and Sponsor Stewardship

- Develop Annual Development Plan in partnership with the Philanthropy Committee to enhance chapter fundraising efforts and donor relations to drive revenue
- Work with the Board to identify and solicit sponsors for annual programs and events
- Steward members supporting philanthropic efforts from individual, corporate and foundation donors
- Maintain database records for donors as they move through the donor cycle

ANNUAL PERFORMANCE METRICS

Membership Retention: Renewal rate of 75% or greater

Membership Growth: Overall growth rate of 2.5% or greater

Member Satisfaction: Member communication and concerns will be responded to within one business day

Budget: Maintain total expenses within 10% of budget projections

Budget: Meet or exceed budgeted revenues

Educational and Networking Events: Overall participant growth rate of 5% or greater

Educational and Networking Events: Maintain or reduce expenses while maintaining quality

Administration:

- Schedule, prepare and distribute meeting materials to committee members prior to meetings within up to 5 business days of the meeting
- Staff meetings, including conference call administration and minutes
- Ensure timely follow-up occurs on actions items from meetings
- Ensure timely and adequate communication between 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 five pages), References and Budget. Convert all documents to PDF and combine in one file and submit to: Morgan Collier, Immediate Past President, AFP Chicago, mcollier@crystorey.net

Cover Page

Proposer's Name

Contact Name and Title

Address, Email and Phone

Proposer website address and social media handles

Proposal Narrative

Please describe proposer's experience and approach to providing association management services, addressing each heading in the Statement of Work, inclusive of the chapter's performance standards.

Each proposal will also include:

- Description of your firm's experience with similar clients/associations, including their approximate budget level.
- Description of your firm's commitment to Inclusion, Diversity, Equity and Access (IDEA), including your firm's makeup, how IDEA is incorporated into your business practices and how IDEA principles will be utilized in carrying out this work.
- Identify how you will manage, service, and support AFP Chicago, specifically outlining your engagement of volunteer leadership and technology.
- Present a detailed process for your services and how those components will benefit AFP Chicago.
- Any additional information that may be germane to the proposal and the evaluation of the firm's experience.

References

On a single page, list contact information (including specific contact person) of up to three references that can speak to the proposer's association management, or related experience pertinent to this solicitation.

Budget

On a single page, provide a budget description of the costs for proposed association management services. Please detail the fees associated with providing the detailed Statement of Work and any additional costs that may be associated with fulfilling this scope of work.

Proposals must be received by 7:00 pm on October 9, 2020.

PROPOSAL EVALUATION

Proposals will be evaluated as follows:

Section: Total Possible Points:

Proposer's Experience and Approach	15
Responsiveness to Statement of Work:	
o Administrative	15
o Financial	15
o Membership	15
o Marketing/Communications	15
o Events	15
<u>Budget</u>	<u>10</u>
Total	100

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 October 23-29, 2020. A final decision will be announced no later than December 1, 2020.

Important Dates

Deadline

1. RFP Notice – Open for Submission	September 22, 2020
2. Proposal Submission Deadline	October 9, 2020
3. Conducts Interviews, as appropriate	October 23-29, 2020
4. AFP RFP Committee presents top proposals to AFP Executive Committee	November 6, 2020
5. AFP RFP Committee presents top proposal(s) to the AFP Chicago Board of Directors for final selection	November 20, 2020
6. Approval by AFP Chicago Board of Directors and Contract with Selected Proposal	December 1, 2020
7. Contract to begin	January 1, 2021

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

All inquiries regarding this proposal should be directed to: Morgan Collier, Immediate Past President, AFP Chicago at mcollier@crystorey.net