

Canadian Society of
**Professional
Event Planners**



Société canadienne de
**planificateurs
professionnels
d'événements**

REQUEST FOR PROPOSAL

Who we are

CanSPEP (Canadian Society of Professional Event Planners) is a vibrant and growing society of entrepreneurial event planners from across Canada. We are a powerful group of entrepreneurs, many of whom are recognized industry leaders. Formed in 1996, the organization provides a forum in which members can meet to exchange ideas, develop skills through educational programs, and share partnership opportunities that foster business growth.

Vision Statement

Leading Canada's entrepreneurial meeting and event management industry through education, collaboration awareness and advocacy

Mission Statement

Make our members successful by providing

- 1. Education*
- 2. Tools*
- 3. Opportunities for growth*

Through the following four pillars:

- 1. Membership growth, retention and satisfaction*
- 2. Education for event entrepreneurs*
- 3. Financial sustainability*
- 4. Advocacy*

What we seek

CanSPEP is now accepting proposals for association management services for a 2 year term, as of July 1, 2018 to June 20, 2020 with an option to renew for a 3rd year. Your company is invited to submit a proposal for consideration. The proposal should take into account a Strategic Direction and a Tactical Direction and be priced separately. Please review the following information and submit on or before the deadline as listed below. We look forward to reviewing your submission.

Strategic Direction

The association management company will advise, support, lead and mentor the Board of Directors towards fulfilling our Mission and Vision statements.

- Position CanSPEP positively as an industry influencer to further promote and support the association as the leader for Business Event Entrepreneurs to generate both sponsorship/partnerships/marketing revenue and memberships
- Understand and track industry trends and share with the board

CanSPEP RFP–Association Management

- Develop an expansion program of our network of Communities that will serve to increase membership and awareness of CanSPEP across Canada
- Work with the CanSPEP Board of Directors to set goals to achieve a specific level of membership by a specific date
- Network with other Association Managers to ascertain methods, programs, strategies to increase national membership
- Evaluate CanSPEP's current membership criteria and determine the viability of other membership categories
- Evaluate the value of the current membership benefit program and explore potential membership benefits that have a residual monetary component
- Develop other streams of revenue
- Ensure all initiatives and direction of the Association are in line with the Strategic Plan developed by the Board of Directors
- Assist the Board of Directors in assuring that the daily management and governance of the association is in line with the Strategic Plan as well as achieving the initiatives identified in the Strategic Plan are managed to timelines.

Tactical Direction

General Administration

- Perform Secretarial responsibilities, including managing enquires and informing the Board of Directors of issues as they arise.
- Attend board meetings, record and distribute minutes and send to President within 3 business days, and distribute to the Board within 1 week of Board Meeting
- Update website as required
- All other duties as assigned by the board of directors

General Administration: Annual General Meeting

- Prepare and mail Notice of Meeting to the membership
- Prepare and mail call for nominations for positions to the membership, mail slate of candidates and email Audited Financial Statements prior to the Annual General Meeting

General Administration: Conference Assistance

- Provide support to Conference Committee as required
- Attend committee meetings as requested
- Coordinate online registration
- Distribute Conference materials
- Collect and prepare delegate conference bags, incl. delegate list, name tags, etc.
- Assist creation and distribution of online conference evaluation and evaluation
- Provide financial summary for Committee post conference
- Attend pre-con meeting for conference
- Provide onsite management at conference

General Administration: Awards program

- Mail/email Call for Nominations prior to annual conference
- Collect nominations
- Order awards

CanSPEP RFP–Association Management

General Administration: Registration Processing for CanSPEP National Events

- Number of National Events per year: six estimated
- Oversee registration process
- Process registration fees and produce registrant name badges for National events
- Maintain detailed registration lists
- Send pre-registration listing to VP Education and appropriate committee
- Send delegate listing to sponsors/event host as required

General Administration: On-Site Management for CanSPEP National Events

- Manage registration desk and on-line credit card registration
- Compile Host Sponsor package and distribute to appropriate sponsor
- Maintain copies of flyers and other material for upcoming meetings events and conferences etc. and membership
- Maintain copies of speaker materials, including biography

General Administration: Online Assistance

- Review incoming requests to ensure they are accurate and appropriate
- E-mail request to members

Membership

- Maintain membership database and renewals
- Provide monthly membership status report to V.P. of Membership
- Identify lapsed/lapsing members and report to the VP Membership
- Send information packages in a timely fashion to people requesting membership applications
- Provide VP Membership with quarterly reports of current uncommitted membership prospects
- Prepare and arrange for distribution of 5 year certificates and 10 year pins and report to VP of Membership
- Provide Community Chairs notice of new members in their community, including contact information.

General Administration: Technology

EventSystemPro sponsors an all-in-one system to manage:

- event web sites and registrations,
- membership information/finances,
- proposal submissions,
- external and internal communications,
- 3 distinct directories (Planners, SME's, Corporate)
- other
- Does your proposal include the use of different technologies? If so, please identify and is there a cost associated with such technology? Please describe.
- If no, are you comfortable learning new web based technologies? Please note: Complete training will be arranged and delivered directly with current technology provider if needed
- Regardless of platform, the Association Manager will be responsible for managing and maintaining the various components and ensure the proper handling of the information stored within.
- Liaise with technology provider for technical support and further development if instigated and approved.

Marketing and Communications

- Draft all CanSPEP event e-invites provided by committee chairs, for review by VP of Marketing and Communications
- Production of Marketing and Communications materials
- Distribute event and reminder notices
- Onsite support for National CANSPEP Events
- Provide VP of Marketing and Communications with updated list of media used to promote CANSPEP
- update ads as required, with direction from VP of Marketing and Communications
- update media listing as required
- Produce collateral and organize booth space at industry trade shows as required, with direction from VP of Marketing and Communications

Partnership and Sponsorship

- Respond to all requests for partnership
- Follow up with sponsors from prior year to determine interest in repeating
- Issue contracts and Invoice all supplier/partners and follow up on receivables
- Assist VP Partnership in providing ongoing updates to the Executive on Partnership Program status
- Assist VP Partnership / Sponsorship to create/update overall sponsor prospectus
- Maintain database
- Manage sponsor commitments
- Maintain website with sponsor recognition
- Organize and Execute Supplier Appreciation Event

Secretary/Treasurer

- Assist Treasurer and Board to prepare Annual Budget
- Prepare Audit documentation for preparation of annual statements presented at the AGM
- Maintain accounting files for production of financial statements
- Maintain accurate accounting records for CANSPEP
- Provide Treasurer with financial statements
- Reconcile monthly bank statements
- Ensure merchant accounts are in good order and provide any account policy changes to Treasurer
- Send reminder statement on outstanding fees
- Provide list of unpaid registration fees to Treasurer within 45 days of meeting date
- Invoice Sponsors and Partners within 2 business days of notification from VP or committee members
- Provide list of unpaid sponsor or partnership fees to Treasurer

Community Support

- Assist to maintain current information in databases
- Update Community web page with event information within 1 business day once provided
- Provide secretarial support to VP Communities for upcoming events
- Follow up on outstanding payments for Community events
- Provide financial statements to Community within 10 business days of event
- Provide quarterly financial statements to Community

Submission Requirements

Proposals should include:

- Corporate Experience with similar size and type of associations, over a minimum of 5 years, including governance best practice development
- Three examples of association management including performance metrics, eg. Membership increases, revenue, etc.
- CV of Association Manager to be assigned to CanSPEP
- Names of other staff to be assigned to contract with general description of responsibilities (book keeping, registration, website, etc.).
- Demonstration of understanding of our requirements
- Breakdown of Fee Schedule for both Strategic and Tactical and include the rates for each year and the possible 3rd year option

Selection Process

- Bids will be rated on their ability to fulfill criteria 1 through 5 above
- The top three may be invited to make a presentation which must include the proposed Association Manager via teleconference to the Board.
- Proposed Fees will be divided by the points achieved through criteria rating and teleconference presentation. Lowest cost per point will be the first respondent which CanSPEP will seek to enter into a contract with.
- Board reserves the right to enter into a contract with any or none of the proposals.

Primary Contact Information	
Name:	Patricia Pearson
Title:	President
Company:	CanSPEP (Canadian Society of Professional Meeting Planners, Inc.)
Telephone:	613-797-7766 ext. 1
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Response date:	April 20, 2018

Proposal Review – Key Dates	
March 23, 2018	Deadline to forward questions relevant to RFP
March 30, 2018	Replies to questions relevant to RFP
April 20, 2018	Deadline for submissions
May 4, 2018	Notification of short list
May 14-18, 2018	Candidate interviews
May 25, 2018	Candidate chosen
July 1, 2018	Commencement of Association Management Company