

# REQUEST FOR PROPOSALS FOR COUNCIL ADMINISTRATOR SERVICES

The <NAME OF COUNCIL> is requesting proposals for providing Council Administrator services. Proposals are due no later than <TIME< DAY< DATE>. Proposals should be submitted to:

NAME  
ADDRESS  
ADDRESS  
CITY, STATE ZIP  
TELEPHONE, FAX  
EMAIL

## **BACKGROUND**

The <NAME OF COUNCIL> is the professional association of individuals whose work includes developing, marketing, structuring, and administering major charitable gifts. <NAME OF COUNCIL> is a member council of the Partnership for Philanthropic Planning. The Partnership currently consists of 128 councils representing 10,000 nonprofit fundraisers, consultants and financial advisors. The mission of the Partnership is to increase the quality and quantity of charitable planned gifts by serving as the voice and professional resource for the gift planning community.

The <NAME OF COUNCIL> currently has <NUMBER> members. Our council's mission is <INSERT MISSION STATEMENT>. We carry out our mission by engaging in the following regular activities:

<LIST PROGRAMS AND SERVICES>

## **COUNCIL LEADERSHIP**

The Board of Directors is comprised of <NUMBER> board members and meets <NUMBER OF TIMES> annually for <LENGTH OF TIME>. <INSERT OTHER LEADERSHIP INFORMATION AS DESIRED>

## **PROPOSED SCOPE OF WORK**

We are seeking proposals from qualified organizations or persons to provide Council Administrator services as detailed below:

### **A. Administration**

1. Membership File Management:: the Chapter Administrator shall work with the Partnership's national office to maintain a current database of council membership and member prospects, in accordance with the information requirements of the council; such database shall be maintained electronically so that mail/email lists and membership directories can be produced automatically. In addition, database should track member's attendance at council events.
2. General Management: the Council Administrator shall be responsible for overall operations of the council, including contact with officers and board members and the implementation of policies and procedures. The Council Administrator shall maintain all council records and assist the council in promoting a positive and professional image of the council and its industry. The Council Administrator shall act as an agent of the Council in negotiating contracts.
3. Financial Management:
  - a. Accounts Payable  
Preparation of checks, prepare check request forms, copy all transactions

b. Accounts Receivable

- Invoicing for meetings and non dues income
- Copying of all checks to be deposited
- Prepare deposit register
- Banking
- Data Entry
- Deposits/create invoice and receipt
- Payables/enter each check transaction
- Monthly Accounting/General Ledger/Financial Statements
- Allocate transfers in and out
- Journal entry adjustments
- Bank reconciliation
- Produce monthly and annual financial statements
- Assist in yearly budget preparation

c. Dues: Process all new dues and dues renewals received from the Partnership. Comply with all requirements of the Partnership's Integrated Council Data Management System (ICDMS).

d. Taxes: The Council Administrator shall provide membership and association records on behalf of the council for the timely filing of taxes and other required reports. The Council Administrator shall assist the council, as required, in identifying and hiring an Accountant for these purposes and monitor the filing with all tax submittal requirements.

e. All financial transactions will require the signature of either the President or the Treasurer of the council for all checks written to the Council Administrator for services or reimbursements and for all transactions.

4. Receptionist: the Council Administrator shall provide a dedicated telephone line answered, <"NAME OF COUNCIL">. Additionally, the Council Administrator will maintain and properly distribute e-mail for the council.
5. Board of Directors: Staff the Board of Directors which includes scheduling, preparation and distribution of materials, attendance at meetings. Take a leadership role in Board Development, development and implementation of programs of benefit to the members.
6. Legal Documents: the Council Administrator shall maintain all required council legal documents and contracts.

## **B. Membership**

1. Membership Services: the Council Administrator shall be responsible for maintaining membership services. The Council Administrator shall monitor services and assist in evaluating new services on an on-going basis.
2. Membership: The Council Administrator will serve as liaison to NCPG for membership listings and updates; serve as primary contact for membership; maintain supply of membership materials and mail to prospective members and new members; print labels for use by the Council for all approved activities; work closely with the Membership Committee Chair; and prepare membership reports for the Board meetings as requested.
3. Non-Dues Income: the Council Administrator shall take a leadership role in identifying and implementing opportunities for non-dues income.

## C. Information Services

1. Program Meetings: the Council Administrator shall prepare and distribute all program meeting information; receive and track reservations and payments; attend the meetings to assist at the registration desk; log payments received at the event and prepare and mail invoices for payments not received; prepare nametags; and make all logistical arrangements.
2. Speakers: the Council Administrator shall make or coordinate travel and logistical arrangements for all program speakers; process expense reimbursements; prepare handouts; and tabulate program evaluations.
3. Annual Conference: the Council Administrator shall attend committee meetings, assist the committee chair in coordinating committee activities, prepare and process mailing promotional mailings/emails, receive registrations and payment, log payments received at the event and prepare and mail invoices for payments not received; attend the conference and assist with registration.

Prepare and mail solicitations to potential exhibitors; receive contracts and payments from vendors; prepare and mail invoices for payments not received.

The chapter administrator shall coordinate with outside vendor(s) web-based registration for the above events, as directed.

4. Website: The Council Administrator shall work with the council's designated website coordinator to keep the website up-to-date.

## PROPOSAL CONTENTS

Please provide an electronic proposal, describing your, or your firm's, ability to perform the work requested. Proposals should include the following:

1. Business profile. Provide a description of how you are organized to serve your clients.
2. Workplan. Provide a description of how your company would provide services in fulfillment of the scope of work.
3. Staffing. Describe how your company will make staff assignments for this project, and provide background on the staff to be assigned.
4. Website Management Capabilities. Describe your capabilities and experience in setting up and maintaining websites. If possible, provide URL addresses of websites you have set up and/or maintain.
5. Experience/Client references. Describe experience serving associations similar to <NAME OF COUNCIL>. Provide client references with contact information.
6. Cost. Provide an explanation of how your company charges for its services, including all costs for providing services detailed in the proposed scope of work. Describe how your company would charge for services requested outside the proposed scope of work.

A committee will review all proposals received, and evaluate based on experience, qualifications, and cost. Interviews with selected candidates will be conducted. Selection is expected in <MONTH YEAR>, with services provided beginning <MONTH YEAR>.