



Request for Proposals
for
Association Management Services

Proposals Due:
For More Information:

September 12, 2017 @ 5:00 PM Eastern Standard Time
Sharon Murray, ASHA President
sharondmurray@yahoo.com

BACKGROUND

The mission of the American School Health Association (ASHA) is to transform all schools into places where every student learns and thrives. ASHA's volunteer leadership consists of a 13-member Board of Directors who rely on a small staff to oversee day-to-day operations, secure funding for programs and services, and support implementation of our mission. Since 2013, ASHA has contracted with a single association management company to provide full-service staffing support. Today, ASHA is in a position to better manage operations and the Board of Directors is now exploring new staffing models to maximize resources and meet the diverse needs of constituents.

To fully support implementation of ASHA's strategic plan, the Board of Directors envisions a need for three distinct domains of staffing: 1) Business Operations, 2) Programs and Member Services, and 3) Development and Fundraising. Due to the unique qualities and needs within each domain, the Board is interested in vetting entities that possess unique skills and experiences relative to the domain or domains in which they will be working. ASHA recognizes it may be difficult to find a single contractor that can fulfill all the functions defined in all three domains. As such, the Board reserves the right to award multiple contracts as necessary to the most qualified and competitive contractor or contractors within each domain.

The purpose of this RFP is to request bids from interested and qualified parties having the expertise and capacity to fulfill the **Business Operations domain ONLY**, which is described below. Future RFPs will solicit submissions for the remaining two staffing domains.

Eligible parties are any individual or entity that meet the qualifications defined for the domain. Examples of eligible parties include association management companies, institutions of higher education, consulting firms, individual contractors, non-profit organizations, or other similar entities.

BUSINESS OPERATIONS

The business operations staff will be one or more individual, employed by ASHA on a contract basis. The ASHA Board of Directors may award just one contract for all of the business operations functions or award multiple contracts to the most qualified and competitive bidders. Business operations staff will carry out duties which include such things as financial management, human resource supervision including direction of other staff or sub-contractors, executive level board support, contract management, and working with the Board of Directors to ensure consistent implementation of approved policies and procedures.

Specific ongoing duties include, but may not be limited to:

A. Financial Management

- Maintain fund accounts in a federally insured institution.
- Manage ASHA accounts payable and receivable systems and processes both in a timely manner.
- Generate monthly accrual-based financial statements in accordance with Generally Accepted Accounting Principles (GAAP), distributing and circulating reports in a timely manner to the ASHA Treasurer and Board of Directors.
- Manage membership financial activities and accounting.
- Manage all program financial activities and accounting.
- Provide budgeting, cost accounting, and other planning assistance to ASHA leadership.
- Coordinate ASHA annual audit with outside accounting firm approved by the ASHA Board of Directors.
- Provide data required for third-party preparation of all required federal and state tax returns for ASHA.

- Ensure ongoing compliance with Internal Revenue Code 501(c)(3) requirements, with attention to Unrelated Business Income Tax (UBIT) matters.
- Interact with third-party investment counselors charged with compliance with Board-authorized investment policies.
- Assist with selecting a firm to conduct an annual financial audit.

B. Membership Development and Maintenance

- Ongoing annual dues invoice preparation and distribution on a schedule and in a manner designed to maximize response.
- Develop and maintain a membership prospect databases for both individual and organizational members.
- Create or update, and distribute membership promotion collateral materials.
- In close consultation with the volunteer leadership, including chairpersons of standing committees, develop, conduct, and analyze membership needs assessment surveys.
- Respond in a timely manner to new and existing member inquiries.
- Work with ASHA's designated Programs and Member Services expert to create, implement, and maintain a membership development and retention program.

C. Association Operations

- Maintain ASHA data and databases through an association management system (AMS).
- Maintain the ASHA website and communication platforms including School Health Action and CHEN email lists, and social media accounts until such time that those duties are transitioned to a contractor overseeing the Programs and Member Services staffing domain.
- Negotiate and execute contracts as an authorized agent of ASHA in a manner consistent with budgeted programs and services.
- Ensure maintenance of Director and Officer insurance coverage.
- Where needed, participate in meetings of the standing committees, and taskforces of the Association.
- Where needed and requested by the ASHA President, provide support to the volunteer leadership related to governance and operations.

The list of tasks and duties described above is not intended to be exhaustive. The list is intended to provide an overview of the nature of tasks that may be included in the scope of work for each contract. Upon notification of award, each contractor will work closely with the ASHA Board of Directors and other awarded contractors to develop a detailed scope of work or annual work plan that is aligned with and supports ASHA's current strategic plan. Prospective contractors are encouraged to present their experiences and successes in implementing activities similar to those described above.

QUALIFICATIONS AND PROPOSAL REQUIREMENTS

The ASHA Board of Directors will select the most qualified and competitive contractor(s) for each staffing domain. To qualify for consideration in any staffing domain, review the list of qualifications below. In your proposal, describe how your entity meets those qualifications and include all items in the corresponding checklist.

A. Qualifications

- Demonstrated experience providing executive level staffing support for 501(c)3 organizations or professional associations of a similar size to ASHA.
- Documented history of exemplary financial integrity including highly qualified accounting staff and the ability to produce accurate and timely financial reports.

- Budget management skills, including budget preparation, analysis, decision-making, and reporting.
- Proven ability to collaborate with and motivate board members and other volunteers.
- Capacity to ensure ASHA remains in good standing with all necessary filings and required reports.
- Infrastructure to be the primary contact for ASHA.

B. Proposal Checklist

- In narrative form, describe your entity’s history and organizational structure.
- Describe your capacity to fulfill the duties and responsibilities described above.
- Include a list of existing or past clients and contact names for whom you have provided services similar those described above.
- Describe your proposed staffing structure
- Include a resume or Curriculum Vita of all staff who will play a direct role in supporting ASHA.
- Provide an example of membership requirement and retention campaigns developed.

QUESTIONS AND PROPOSAL SUBMISSION

Prospective contractors may pose questions or request additional information about this RFP in writing to ASHA’s President, Sharon Murray via email sent to sharondmurray@yahoo.com. Additionally, ASHA’s leadership will host a conference call for interested parties on **August 28, 2017 at 3:30 PM Eastern Standard Time** to publicly answer questions about this RFP. Participation in the call is not required and will not factor into any decisions about which proposal or proposals are awarded. Advance registration is not required, to join the call:

Dial in Number: 712-451-0200
Access Code: 759386

Final proposals should be addressed to the ASHA Board of Directors and sent electronically to:

Sharon Murray, ASHA President
sharondmurray@yahoo.com

Proposals must be received by: **September 12, 2017 at 5:00 PM Eastern Standard Time.**

TIMELINE

Release of RFP	August 21, 2017
Call hosted by ASHA Leadership to answer questions.....	August 28, 2017
Proposals Due	September 12, 2017
Finalists Selected.....	October 3, 2017
Interviews with Finalists	October 10, 2017
2017 ASHA School Health Conference, St. Louis, MO	October 11–13, 2017
Notification of Award.....	October 17, 2017
Contract Negotiation Period and Work Plan Development	October 17–27, 2017
Begin transition to new contractor(s).....	November 1, 2017
Transition to new contractor(s) complete	December 1, 2017

ABOUT ASHA

The American School Health Association was founded as the American Association of School Physicians (AASP) on October 27, 1927, by 325 physicians at the annual meeting of the American

Public Health Association in Cincinnati, Ohio. The charter members represented 29 states and Canada. The first president was William A. Howe, M.D., Buffalo, N.Y. Interest in the Association grew so rapidly that in 1936, the AASP opened its membership to all professionals interested in promoting school health. The organization officially became the American School Health Association.

Today, more than one-half ASHA's members practice in K-12 schools or advise and oversee health education or health services programs in schools or state agencies charged with managing school health programs. ASHA's membership consists of both individuals and organizations that support, promote, develop, and implement health promotion programs in public and private schools cutting across many health topics areas.

At the core of ASHA's philosophy is a multidisciplinary and coordinated approach to school health exemplified by the [Whole School, Whole Community, Whole Child \(WSCC\) model](#). Our membership includes administrators, counselors, dietitians, nutritionists, health educators, physical educators, psychologists, school health coordinators, school nurses, school physicians, and social workers among others. To learn more about ASHA, visit our website at www.ashaweb.org/about. Here you can review our most recent Annual Report, Bylaws, Core Beliefs, Strategic Plan, Financial Standing and other important information about ASHA.