



# RFP-SCOPE OF SERVICES FOR ASSOCIATION MANAGEMENT SERVICES

## REASON FOR PROPOSAL REQUEST

**THE CALIFORNIA PRECAST CONCRETE ASSOCIATION (CPCA)** is managed by an independent contractor who functions as the Executive Director of the Association. The current contractor is retiring and CPCA is in search of a new Executive Director. Additional information regarding CPCA can be found at [www.caprecastconcrete.org](http://www.caprecastconcrete.org)

## HISTORY OF THE CALIFORNIA PRECAST CONCRETE ASSOCIATION

CPCA was formed in 1990 by a group of precast concrete manufacturers who felt a local organization was necessary to address matters of concern to the precast concrete industry in California. Now, well into the third decade of service to its members, the focus of CPCA remains on the advancement of quality, precast products.

CPCA operates as a non-profit California corporation with standing committees under the leadership of an Executive Board. It maintains a strong voice in legislative and industry related regulatory issues. CPCA remains a member driven and member supported organization. CPCA members produce a full range of quality concrete products. Offerings include, but are not limited to, drainage structures, septic tanks, catch basins, site amenities, CEV Vaults / engineered precast products, concrete pipe and box culverts.

## MISSION

The purpose of the California Precast Concrete Association is to promote the use of quality precast cementitious products, provide useful information to the membership and to address issues of importance to the precast concrete manufacturing industry.

## TYPES OF MEMBERS

Membership is by company with Producers and Affiliate Members. Currently, CPCA has 43 Affiliate Member companies and 17 Producer Member Companies consisting of 155 individuals. Membership is renewed on the calendar year.

## LEADERSHIP STRUCTURE

The Board consists of four officers, and up to nine members. All officers and seven board members are Producer Members. Two of the board members are Affiliate Members. Lists of Board of Directors appears in this [link](#).

## ANNUAL CALENDAR OF MEETINGS & EVENTS

- Fall and Spring Conferences (60-80 attendees)
- Production School – 1 ½ day event with 20-25 students
- Lunch and Learn events
- Lobby Day
- 4 Board Meetings (2 are in conjunction with both conferences; 2 are virtual)
- 2 Meetings of the Members (in conjunction with both conferences)
- 1 Golf tournament (in conjunction with one conference - Spring)
- 1 Texas Hold'em tournament (in conjunction with one conference - Fall)

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### Executive/Administrative

- Serve as the Executive Director of CPCA which includes both thought leadership about the future of CPCA and its potential, as well as the management of day-to-day operations.
- Assist in the implementation of directives of the executive committee and board of directors.
- Coordinate board meetings including assisting the president with setting the agenda and providing the board with meeting materials.
- Oversee administrative print and electronic files and records, and maintain organizational archives.
- Maintain passwords, log-in information and other important details for all accounts.

### Website and Social Media

- Manage association equipment, supplies and software.
- Develop marketing plans/approaches for events and other CPCA activities in order to ensure maximum exposure and participation.
- Maintain database to ensure that email list and social media accounts are current and accurate (currently in MemberClicks Association Management software).
- Become familiar with content management system, social media and other forms of communication utilized by CPCA.
- Serve as webmaster and ensure that all content is accurate and posted in a timely fashion.
- Post CPCA news and activities, and other news of interest to CPCA membership on social media and website.
- Maintain calendar of events and ensure that pricing details and registration deadlines are accurate.
- Prepare and send out electronic correspondence (emails, announcements, etc.) as needed by the CPCA leadership, Committee Chairs.
- Identify, negotiate and maintain current vendor/software contracts in coordination to support communication and publishing activities.

### Financial/Database Management

- Manage CPCA's finances in coordination with the volunteer treasurer, maintaining all financial data using relevant software (Currently QuickBooks Desktop).
- Provide financial reports as requested by treasurer and board.
- Assist treasurer and board with annual budget preparation.
- Assist board and committee chairs with identifying and soliciting meeting and event sponsors and ensuring that sponsor entitlements are fulfilled.
- Manage accounts payable and receivable.
- Invoice attendees, sponsors, and companies, as necessary.
- Process money received (checks, credit cards, cash).
- Reconcile bank and credit card statements.
- Provide receipts and/or refunds for member activities, upon request.
- Reimburse members, officers, board members and others, as appropriate.
- Make bank arrangements for account signatories.

### Member/Volunteer Support

- Maintain the membership database including addition of new members, renewals, removal of dropped members and job/address/phone/email changes (Currently using MemberClicks).

- Provide reports of membership and other lists as requested by CPCA leadership.
- Conduct annual membership renewal/recruitment campaign.
- Advise board on recruitment and retention strategies.
- Manage annual volunteer recognition activities (Robert Evans award).
- Manage association member/sponsor relations.
- Assist committees and other volunteer groups with information on procedures and policies to conduct their work.

### **Meeting and Event Management**

- Manage CPCA's Fall and Spring conferences held in various locations each year. Conference management includes assisting committee with program development, logistical support, recruiting sponsors, etc.
- Manage CPCA's regular member meetings (two per year), small groups and committee meetings, networking activities (tours, golf tournament), etc.
- Serve in an advisory capacity to event chairs and association leadership, communicating event logistics to committee/event chairs, members and participants.
- Identify and negotiate conference and event site contracts.
- Serve as primary point of contact with event venues by providing attendee count, special meal requirements, technology needs by requested deadline.
- Secure conference and event exhibitors/sponsors, and coordinate exhibitor and sponsor agreements and required payments.
- Market conferences, production school and Lunch and Learn events.
- Assist conference and event participants with registration via email and phone.
- Manage pre-registration and on-site registration for conference and events, as applicable, which includes the collection of payments.
- Prepare registration lists, nametags and materials for conference and other events.
- Take photos at conference and other events to post on website, and social media.

## RESPONSE FORMAT AND PROPOSAL INSTRUCTIONS

Responses must include the following information that will serve as the basis for rating qualifications of the individual/firm in this RFP.

In the review process, CPCA will evaluate proposals on the basis of the following information that must be submitted in each response:

- 1) Provide an *executive summary* of your approach -- condense and highlight your approach to the contents of the proposal. The summary should provide the CPCA Board with an overall understanding of the proposal and the individual/firm's approach.
- 2) Provide evidence of the individual/firm's ability to provide association management services, including company background and history.
- 3) Provide the following information:
  - a. Identify how you will manage, service and support CPCA.
  - b. Describe your individual/firm's experience with similar clients/associations.
  - c. Present a detailed process for your services and how those components will benefit CPCA.
- 4) An outline of the individual/firm's credentials and the professional experience of individual staff members— positions held, past clients, etc. Individuals/firms should include resumes or other descriptions of relevant past experience and qualifications of key individuals who will work with CPCA.
- 5) Individuals/firms must list at least three (3) references for similar work completed in the association management market that includes the following information: company name, address and phone number; contact name, title and e-mail; website address (if applicable). CPCA may contact the individuals listed to validate the nature of the individual/firm's experience.
- 6) Fee Structure: Detail the fees associated with providing the detailed Scope of Work and any additional costs that may be associated with fulfilling this scope of work.
- 7) Individuals/firms may also provide any additional information that may be germane to the proposal and the evaluation of the individual/firm's experience.

**SUBMISSION AND GENERAL INSTRUCTIONS** Individuals and firms responding to this announcement shall submit their proposal by email [info@caprecastconcrete.org](mailto:info@caprecastconcrete.org).

### TIMELINE

The following timeline will apply to this process:

- September 15, 2023 - Date for final receipt of all proposals
- September 16-30, 2023 - Initial proposal screening
- October 9 – 13, 2023 – Phone interviews with shortlisted proposals
- October 16- 20, 2023 - Selection and negotiation of contract specifics
- October 31, 2023 - Announcement of selected entity
- November – December 2023 – Transition to new entity
- January 1, 2024 - Formal start date