



Request for Proposal (RFP) for Association Management Services

Issued by: IABC Canada East & Canada West regions

Date Issued: March 10, 2025

Expressions of Intent to Respond: March 24, 2025

Request for Proposals: March 31, 2025

1. Introduction

The International Association of Business Communicators (IABC) Canada East and Canada West Regions seek proposals from qualified association management companies to provide professional services and expertise. The goal is to ensure continuity, good governance, sustainability, and growth for both regions, allowing board members and volunteers to focus on delivering value and setting strategic direction.

2. Background

The role of the IABC Canada regions has evolved, necessitating more effective operations and reduced duplication of efforts. The regions collaborate on key programs, including Dare to Lead, Canada Conference, Silver Leaf Awards, Master Communicator, and the Canada Region Reception at the World Conference. Administrative, communications and channel management, and financial service resource sharing are also integral to our operations.

3. Scope of Work

The selected association management company will be responsible for the following services:

1. Conference Financial Administration

- a. Identify and assist with required tax requirements for the conference.
- b. Manage shared collection and distribution of payments for all revenue-generating programs.
- c. Provide attendance revenue reporting/any trends.
- d. Conduct event financial reconciliation and provide monthly updates.
- e. Handle invoicing for conference sponsors and prepare formal agreements, ensuring payment delivery as per terms.
- f. Provide corporate address.

2. Financial Administration and Bookkeeping Services

- a. Ensure payments are received, including member remittances. Schedule and monitor vendor reimbursements and payments.
- b. Process payments and conduct monthly reconciliation.
- c. Prepare financial statements and reports.
- d. File annual reports to the Canada Revenue Agency, IABC Global Centre, or as authorized/needed.
- e. Coordinate financial review on the client's behalf.
- f. Handle vendor setup and payment processing.
- g. File CRA GST/HST and Income Statements.
- h. Handle invoicing and GST/HST remittance.
- i. Provision of material to an accountant for the annual review – must have a relationship with an accountant.



3. Corporate Mailing Address

- a. Provide a corporate mailing address for both regions.

4. Governance Continuity and Advice

- a. Provide recommendations and assistance with governance continuity, especially around MOU items and board requirements.
- b. Policy assistance as required (CASL, federal and provincial privacy regulations, etc).
- c. Annual General Meeting assistance, as requested.

5. Website Management

- a. Manage and update the joint IABCcanada.ca website, which is currently on the WordPress platform.
- b. Address quick posts (exact scope TBD).
- c. Scheduling certificate and hosting management payments and renewals.

6. Award Program Support

- a. Support the Silver Leaf Awards (May to October) and Master Communicator (January to March).

7. Tech Platforms

- a. Centralize platforms/tech log-ins and provide recommendations for more efficient use.

8. Communication Support

- a. Format content for newsletters and other communication needs.

9. Time Estimate

- a. These are newly contracted services for IABC Canada East and IABC Canada West. At a minimum, we require 10 hours per month together. Hours may vary depending on program demands.

4. Proposal Requirements

Proposals should include the following and be limited to 10 pages or less, excluding appendices:

1. Company Overview

- a. Brief history and overview of the company.
- b. Relevant experience and expertise in association management (scope: local and national).
- c. Availability – provide workday availability and any flexibility (evenings, weekends, etc).
- d. Capabilities for French language translation. Please clarify whether you have these services in-house or would need to outsource. If outsourcing translation, how will you verify accuracy and readability?

2. Approach and Methodology

- a. Detailed approach to meeting the scope of work.
- b. Proposed timeline for immediate and ongoing needs.
- c. How do you handle IT and the backup or storage of information (privacy, policies)?

3. Team Composition

- a. Key personnel involved in the project, including their qualifications and experience.

4. References

- a. At least three references from similar projects.

5. Cost Proposal

- a. Detailed cost breakdown for the services provided.
- b. Preferred pricing model: hourly rate or a retainer. Is there a minimum of hours/month? Can unused time be carried over?
- c. What is the payment process?
- d. Identify any services outside the proposal's scope and their associated costs.



6. Ability/Willingness for Growth and Expansion

- a. IABC Canada East and IABC Canada West regions are affiliated with 15 chapters in all 10 provinces from BC to Newfoundland and Labrador. There may be a potential interest in extending/expanding the project scope and extending service to these chapters at one time in the future.

5. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

1. Relevant Experience and Expertise (30%):

- a. Demonstrated experience in providing association management services (locally and nationally).
- b. Expertise in financial administration, event management, and governance support.

2. Approach and Methodology (25%):

- a. Clarity and feasibility of the proposed approach to meeting the scope of work.
- b. Innovative solutions and best practices for efficient operations.

3. Qualifications of Key Personnel (20%):

- a. Relevant qualifications and experience of the team members.
- b. Ability to provide consistent and high-quality support.

4. Cost-Effectiveness (15%):

- a. Competitive pricing and value for money.
- b. Transparency in cost breakdown and potential for cost savings.

5. References and Past Performance (10%):

- a. Positive feedback from previous clients.
- b. Proven track record of successful project delivery.

6. Additional Services

Proposals should also identify any additional services that may be required but are not currently part of the company's standard offerings. These may include, but are not limited to:

- Advanced data analytics and reporting.
- Strategic planning and consulting services.
- Enhanced member engagement strategies.
- Customized training and development programs for volunteers and board members.

7. Performance Metrics and Reporting

- Include requirements for regular reporting and performance reviews.
- Specify how the performance of the association management company will be measured.

8. Conflict of Interest

- Request information on how the company handles potential conflicts of interest.
- Ask for a declaration of any existing conflicts.
- How privacy and confidentiality are managed.

9. Data Security and Privacy

- Outline expectations for data security and privacy, especially if the company will handle sensitive member information.
- Include requirements for compliance with relevant data protection regulations.



10. Transition Plan

- A detailed transition plan is needed to ensure a smooth handover from current service providers.
- Include timelines and key milestones for the transition period.

11. Insurance and Liability

- Specify any insurance requirements, such as professional liability insurance.
- Include expectations for indemnification and liability coverage.

12. Termination Clause

- Clearly outline the terms under which either party can terminate the contract.
- Include notice periods and any associated costs or penalties.

13. Innovation and Continuous Improvement

- Continuous improvement strategies.
- How do you stay updated with industry best practices and incorporate them into your services?

14. Submission Instructions

- **Contract Length:** The contract will be in place for 12 months from the date of signing or as mutually agreed to by IABC Canada East and IABC Canada West regions and the successful vendor.
- Submit an Expression of Intent to Respond to cwr-chair@iabc.com by **March 24, 2025, 6:30 pm MT**.
- Questions will be accepted and answered until March 17, 2025. All questions and responses will be sent to companies that submit an expression of interest.
- Submit your proposal electronically to cwr-chair@iabc.com by **March 31, 2025, 6:30 pm MT**. Late submissions will not be considered.

15. Proposal Evaluation Period

- *Proposal Evaluation:* April 11, 2025
- *Interviews:* April 17, 2025 (to be confirmed)
- *Vendor Selection:* April 25, 2025
- *Award and Implementation:* April 30, 2025

16. For all questions or further information, contact **Wendy Thatcher, Chair, Canada West Region**, cwr-chair@iabc.com.

Additional Clauses

- **Ownership and Intellectual Property:** IABC Canada East and IABC Canada West own and retain all documents and intellectual property rights. At the termination of the contract, all IABC Canada East and IABC Canada West assets and intellectual property must be returned.
- **Termination Notice:** Vendor must provide a 60-day notice of contract termination; IABC must provide a 30-day notification.