



Traffic Club of Chicago
Association Management Request for Proposal (RFP)
Proposals Due on December 10, 2023

Objective

The Traffic Club of Chicago (TCC) is seeking an individual or firm to provide association management services in support of Club growth as a premier professional and industry association. Key functions will include supporting club growth, maintaining exceptional member and sponsor services, managing day-to-day club operations and working closely with TCC Board and Committees to manage club finances, communications, marketing and events.

Background

The Traffic Club of Chicago is a non-profit, membership-based organization for professionals in the transportation industry, based in Chicago and affiliated with Traffic Clubs across North America. The Club's mission is to provide education, networking, and scholarship opportunities to its members.

Requested Scope of Services

TCC is seeking an individual or corporation to provide association management services to support the mission and goals of the organization. Reporting to the TCC Executive Board the association manager will provide, at minimum, the following services:

1. Association Management
 - 1.1. General Office: Support and maintain a club-owned address and phone account(s) with the ability to leave messages.
 - 1.2. Email: Provide/Maintain one general e-mail address for TCC business and additional emails as determined by TCC.
 - 1.3. Maintain call log and respond to general inquiries and/or direct to appropriate TCC board members for response.
 - 1.4. Provide overall coordination and management services at the direction of the TCC board – this work may be related to special projects, research and support of TCC initiatives and programs.
2. Board Meetings
 - 2.1. Support and coordination for up to 12 annual Board meetings that currently alternate between in person and virtual. Locations vary, with preference given to in person meetings hosted by individual members of the board.
 - 2.2. Responsibilities
 - 2.2.1. Maintain yearly schedule of board meetings.



- 2.2.2. Support identification of in-person locations and serve as host for virtual meetings on a TCC approved platform.
 - 2.2.3. At the direction of the President and with the support and coordination of appropriate board and committee members, prepare and distribute communications related to board meetings, including but not limited to invitations, agendas, board reports, action items and follow-up correspondence.
 - 2.2.4. Participate in the meeting and provide advice and information.
 - 2.2.5. Take meeting notes and support the Board Secretary in preparation of Board Meeting Minutes.
3. Committees:
 - 3.1. TCC maintains Standing and Ad Hoc Committees that are subject to change. Current TCC Committees include Annual Dinner, Scholarship, Education, Sponsorship, Networking/Golf, Finance, Membership, Retirees/Volunteers, Young Professionals and Marketing.
 - 3.2. Responsibilities: Attend select committee meetings as appropriate, provide committee chairs guidance and support on TCC management, bylaws and best practices. Assist committees in alignment to TCC Budget, Strategic Plan and Mission.
 - 3.3. Maintain up-to-date lists of all committee members.
4. Financial Management
 - 4.1. Income and expense responsibility: Process, record and deposit income from member dues, event registrations, sponsorship revenue, and advertising income; pay all bills with approval of the treasurer.
 - 4.2. Frequency of reports: Prepare monthly financial reports and consolidated balance statements for the Finance Committee.
 - 4.3. Budget preparation and tracking: Assist the Finance Committee Chair in the budget development and maintain an accurate accounting of income and expenses.
 - 4.4. Investments: Monitor and report on investments.
 - 4.5. Credit cards: Process credit card receipts.
 - 4.6. Audit: Arrange for annual audit/review using TCC contracted accounting firm.
 - 4.7. Budget information: Work with the TCC to develop a budget annually for TCC. The budget and related information will be shared with the Executive Committee via Excel or other approved software.
5. Membership and Sponsorship Support Services
 - 5.1. Database: Maintain a single comprehensive database for all members. Update database, process payments; respond to inquiries, and send information to new members.



- 5.2. Reports: Prepare a variety of exportable reports at the direction of TCC Exec Committee.
 - 5.3. Renewals: Conduct Annual Membership renewal drive.
 - 5.4. Growth: Assist with driving new membership and sponsorships via traditional club avenues (membership, events) and advise on new opportunities for growth.
 - 5.5. Benefits: Deliver member and sponsor benefits including but not limited to distribution of welcome letter, inclusion in member database, invitations to Club events, access to members-only website sections, sponsor advertising in all appropriate printed materials and virtual platforms.
 - 5.6. Manage sponsor outreach, preparation and production of Annual Dinner Sponsor Program Book.
6. Technology
- 6.1. Manage and maintain the TCC website (<http://www.traffic-club.org>) in tandem with the TCC Marketing Committee.
 - 6.2. Execute web editor responsibilities, including developing and maintaining the content for the organization's web presence in collaboration with the Marketing Committee and Executive Board.
 - 6.3. Maintain online membership directory including an appropriate policy for accessibility to this information.
 - 6.4. Continually work with executive, membership and marketing committees to improve the online experience for TCC Members.
 - 6.5. Completing other duties as necessary to assist the organization in furthering its web presence.
7. Club Communications:
- 7.1. Support TCC committees with a wide range of club communications including Waybill, event recruitment and calendar, TCC website messaging, social media, member correspondence etc.
 - 7.2. Ensure sponsor recognition is appropriately displayed in all TCC communications.
 - 7.3. Identify and execute opportunities to communicate the mission and goals of the TCC in the broader industry community.
8. Event Management
- 8.1. Site Selection: Support Committees in identifying pricing venues for a variety of club events and securing contracts and BEOs in the best interest of the TCC. This may include food and beverage as well as accommodation blocks.
 - 8.2. Event Coordination: In ongoing coordination with appropriate TCC committees, provide the broad range of services required to deliver effect events. This work may include but is not limited to coordination with venues, sourcing, hiring and management of third-party vendors, coordination of speakers, VIP and sponsors, oversee production of all

event printed materials including banners, sponsor stuff, programs etc, preparation and distribution of Run-of-Show, and other duties as required for the successful execution of TCC Events.

- 8.3. Manage and Coordinate Event Registration including online collection process. Process advanced registrations, prompt participants to register via e-mail notification, process on-site registrations, distribute badges, collect fees, track and report the number of people registered, follow-up after event to those who attended but did not register.
- 8.4. Marketing and Promotion: Maintain an up-to-date event calendar, promote event on social media, manage printed and electronic invitations, coordinate with marketing committee to identify opportunities to publicize the event.
- 8.5. Onsite Staff: Provide appropriate event support staff and coordinate volunteer staff for key events including annual dinner and golf outing at a minimum.
- 8.6. Post event: For Annual Dinner and Gold Outing provide a general accounting and debrief to committee chairs on event P&L, attendee list, vendor performance and lessons learned for future major events.

9. Insurance

- 9.1. Board of Directors Insurance: Assist TCC with procurement of Directors and Officers Errors and Omissions insurance at TCC's expense.

10. Storage

- 10.1. Maintain virtual storage of TCC documents. Provide oversight for off-site storage material including records, check-out and periodic inventory.

11. General

In general, this scope attempts to define the regular, expected activities of the management service. TCC expects the management to perform a variety of general, minor activities not specifically defined herein. The Executive Board of the TCC will conduct an annual review of services with continuation subject to review.

Timeline

November 10, 2023	RFP Released
December 12, 2023	Proposals due
Week of January 15	Interviews with top vendors
Week of January 26	Selection

Note: Ideally, Association Management services would begin mid-February, 2024.

Proposal Requirements

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, TCC 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 TCC 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 TCC.
 - b. Describe your individual/firm's experience with similar clients/associations, including their approximate budget level.
 - c. Present a detailed process for your services and how those components will benefit TCC.
 - d. Include a list of software to be used in providing services
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 TCC.
5. Individuals/firms must list at least three (3) references for similar work completed in the association management or related market that includes the following information: company name, address and phone number; contact name, title and e-mail; website address (if applicable). TCC 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 including licensing, software and third-party vendors, that may be associated with fulfilling this scope of work. Include a list of any exceptions and services not included in proposed fee The base fee structure is required of all proposals but may be supplemented with:
 - a. Alternate Fee: Provide fee alternatives that provide added value and/or reduced costs to the TCC.
 - b. Incentives: Provide any proposed fee incentives including but not limited to incentives related to growth of membership and sponsorship.



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.

ALL RESPONSES ARE DUE NO LATER THAN 3:00pm, DECEMBER 10, 2023 via email to trafficclubofchicago@gmail.com

Questions and Proposals should be emailed to trafficclubofchicago@gmail.com