



PUGET SOUND GRANTWRITERS ASSOCIATION
Request for Proposals
MANAGEMENT SERVICES PROVIDER
September 2018

SUMMARY

Puget Sound Grantwriters Association, a nonprofit membership organization that serves hundreds of nonprofit professionals in Western Washington State with educational and networking resources that include 15-18 events each year, seeks an entity or individual to provide management services. You ("the provider") will work closely with dedicated volunteers, including the Board of Directors, to extend and add to a tradition of excellence in programming and service to the community.

About You or Your Organization

You should demonstrate a high level of proficiency in nonprofit financial management; event production; experience with database, website, and other technologies; collaboration with volunteers; and other areas of association management (described below). You may be able to satisfy the requirement for proficiency in one or more areas by use of a subcontractor. (It is preferred that you identify any such subcontractor, provide a statement of qualifications, and cite prior successful collaboration. However, it is acceptable for you to describe a plan for securing an as-yet-unidentified subcontractor. Also, see Compensation section below.)

Hours

The ideal provider will appreciate and effectively manage a flexible work schedule. The daily/weekly hours required to fulfill the work contract will depend on event timing and other factors, but based on recent years of operations, we anticipate that you will need to expend up to 600 hours in calendar year 2019. Certain special projects (for example, technology transition or upgrades; accounting and tax preparation services) will be considered separately from this contract. See Scope of Work, below.

Work Environment

The provider will supply its own work space, located within the Puget Sound region. The provider or a subcontractor will be expected to be on-site at most PSGA programs, which occur at rented spaces in the Seattle-Tacoma area. See Scope of Work, below. Equipment and telecommunications expenses will be covered by PSGA, subject to negotiation.

You will be supervised by the Board of Directors, which will designate a primary supervisory contact (expected to be the President of the Board). PSGA will engage you in a performance evaluation process that will encourage dialogue throughout the year as well as a written evaluation toward the end of the contract term.

PSGA is an equal opportunity employer and values diversity.

Compensation

The provider is asked to propose an annual contract rate, that depending on experience and qualifications, falls within the range of \$18,000 and \$33,000. Should you envision use of a subcontractor for any portion of the Scope of Work, the proposal should present an estimated overall cost and/or hourly rate for that work, and fit the cost within the specified range. *Our choice of a provider will take into account cost as well as demonstrated competencies required to fulfill the contract.* PSGA attempts to keep its membership and event fees below those of comparable organizations. We wish to fairly compensate our management services provider while operating within our budget constraints.

Start date

No later than Jan. 1, 2019, and no earlier than Oct. 15, 2018. (The normal contract period is to be the calendar year. Special projects may fall outside of its scope and time period.)

Deadline and procedure for proposals

Preference will be given to proposals submitted by Sept. 27, 2018. Please follow the procedures outlined at the end of this document.

Further information

More information about PSGA is at www.grantwriters.org.

→ If you are not certain that the opportunity is right for you or your firm, we may be able to briefly answer a few questions by email before you undertake the submissions process.

All submissions and queries are to be directed to PSGA Search Committee at PSGA.search@gmail.com.



From top left: A training during the 2017 PSGA Panorama at the Panoramic Center in Seattle; Nonprofit issues blogger Vu Le speaks at the 2014 PSGA Conference; Ben B. Cheney Foundation Senior Program Officer Ken Ristine and Consultant Sylvie McGee discuss a topic at a 2018 South Sound Lunchtime Meeting in Tacoma.



ABOUT THE ORGANIZATION

The Puget Sound Grantwriters Association was founded in 1990 by grantwriting consultant Goodwin Deacon, Ph.D., and became a 501(c)(3) nonprofit organization in 2000. A volunteer Board of between nine and 16 Directors governs the organization, and they join with other volunteers to design and oversee most programs. Since early in the organization's history, the Board has contracted with an individual or organization to provide financial and other operational services.

Today, PSGA has more than 300 members, and we reach many others working or volunteering for the region's nonprofits. We believe PSGA was the first successful grantwriters' organization in the United States, and it remains among the most active regional grantwriters' associations.

Mission

The Puget Sound Grantwriters Association promotes responsible, effective grantseeking and fosters connections among grantseekers, nonprofits, and funders.

Vision

To create an engaged membership
To develop excellent programs
To strengthen the nonprofit sector
To improve our communities

Programs

PSGA offers programs and networking opportunities throughout the year. Programs are available to the public for a fee, but PSGA members attend at reduced or no charge (and receive other benefits described below).

- ❖ **Ten 90-minute Lunchtime Programs** are presented annually, alternating between Seattle and Tacoma and generally occurring once per month (excluding August and November in 2018). These educational events typically offer a guest speaker or panel discussion, and draw from 15 to 125 attendees.
- ❖ **Two 3-hour Funders Forums** are presented annually (one in Seattle, one in Tacoma), enabling grantseekers to meet with funders in a small-group setting.
- ❖ **Three or more Specialized Trainings** of 3 to 7 hours each are scheduled at various times during the year, presenting in-depth workshops led by experienced instructors.
- ❖ **One all-day conference** annually offers multiple educational and networking sessions. Formerly a 12- to 15-session conference drawing some 300 people, the event in 2017 was downsized into a 4- to 5-session event named "Panorama," attracting about 125 people.



A 2018 Seattle Lunchtime Program features Ceil Erickson (Seattle Foundation), Anjana Pandey (Philanthropy NW) and Jonathan Cunningham (Seattle Foundation).

Other resources

Our website features a jobs board as well as information about grantwriting in the Northwest. We also maintain a members' listserv and a modest social media presence

PUGET SOUND GRANTWRITERS ASSOCIATION SCOPE OF WORK

Association Management

- Prepare and maintain organizational calendar, Board and committee rosters
- Serve as the registered agent, when needed
- Administer contracts for PSGA (with meeting venues and other entities as directed by and subject to approval by Committee Chairs or Board Officers)
- Establish, maintain, and collaborate with designated volunteers on Master Communications Calendar
- Document procedures, and maintain project timeline for events on platform(s) accessible to provider and PSGA
- Prepare reports as requested by Board and committees
- Support annual election in which membership elects Board members. Includes management of SurveyMonkey or similar online technology to conduct vote, at direction of the Board

Finances

- Work with Treasurer to oversee organizational finances
- Process accounts payable and accounts receivable
- Ensure deposits are made in a timely manner; weekly at most
- Reconcile bank statements
- Prepare for Treasurer basic monthly reports (P&L; major line-items spreadsheet) and annual financial reports
- Coordinate with a contracted Accountant (or similar service) for annual tax, programmatic and corporate filings
- Maintain current signature cards with banks
- Ensure organization's insurance policies are renewed on time
- Establish and follow procedures for signing checks with the expressed written permission of the Treasurer
- Serve as an authority on financial accounts, within limits to be specified

Membership

- Maintain membership database
- Approve/decline listserv member requests
- Assist in creating organizational marketing materials (flier, online posts and web content)
- Maintain event and membership statistics
- Send membership renewal notices and related communications (electronic)

Communications and Technology

Note: MemberClicks, a web-based technology solution, is used for PSGA's membership database, broadcast emails, website-content and event management. The provider may propose alternatives. PSGA will consider investment in technology transition and/or training expenses if justified by long-term savings, effectiveness or other factors.

- Maintain and/or contract for communications and technology services, including those for which a recurring expense is covered as a separate PSGA budgetary line item:
 - computer and printer with typical office/productivity suite capabilities (equipment costs subject to negotiation)
 - localized and/or cloud software (PSGA line item; may include QuickBooks or similar, online database, online survey tool, MS Office, etc.)
 - high-speed Internet (PSGA line item)
 - website domain (PSGA line item)
 - website host and email server (PSGA line item)
 - printing of handouts, nametags, etc. (PSGA line item)
 - telephone line for voicemail (PSGA line item)
 - mailing address / postal box (PSGA line item)
- Field and answer voicemail, email and mail inquiries. If PSGA clarification is needed, query appropriate volunteer(s) within 1 business day
- Maintain secure systems to house/save association data, records and archives (May involve PSGA line item for off-site storage or other procedures)
- Manage www.grantwriters.org (both the public and member areas)
 - Collaborate with volunteers on:
 - Page content, calendar and other informational features
 - Forms for processing membership, event registration and other purposes
 - Updating, adding or subtracting pages and content as directed, to promote events, archive materials for public availability, etc.
 - Posting of program handouts when available
 - Independently:
 - Assist users with profile inquiries, log-in information, password resets, registration and any other questions about web functions (infrequent)
 - Post Job Postings (infrequent)
 - Post Freelance Listings (infrequent)
- Manage database(s) for event and membership management, including tracking member/non-member attendance, membership renewals, generating reports on trends, and other functions
- Manage online payment processing (note: bank fees are a separate PSGA line item)
- With volunteers, prepare and postal-mail thank-you cards to presenters at programs
- Manage Master Communications Calendar (for planning of outreach activities)
 - Collaborate with volunteers on:
 - E-blasts to members and others (40-50 messages per year)
 - Outreach via social media and other formats
 - Marketing activities TBD
 - Drafting, editing, and proofreading all outgoing communications materials

Seattle Lunchtime Meeting Management (five times annually; 25-125 attendees)

- Manage venue arrangements (contract & logistics setup)
- Send email announcements and reminders based on Master Communications Calendar
- Prepare printed materials. May include signage, nametags, handouts provided by speakers or PSGA, etc.
- Prepare and send email invitations for program follow-up surveys (electronically through SurveyMonkey or similar service)
- Process registrations through online database
- Track attendance history
- Provide onsite meeting management under direction of committee, handling:
 - Onsite registration and membership signups
 - Audio-visual needs
 - Catering arrangements (if needed)
 - Distribution or placement of printed materials referenced above

South Sound Lunchtime Meeting Management (five times annually; 15-25 attendees)

Note: no onsite staffing required.

- Send email announcements and reminders based on Master Communications Calendar
- Process registrations through online database
- Prepare and send email invitations for program follow-up surveys (electronically through SurveyMonkey or similar service)
- Track attendance history
- Coordinate with PSGA volunteers who provide onsite meeting management

Annual Educational Event Management ("Panorama" - once annually; 100-150 attendees)

- Manage venue arrangements, contract & logistics. (Does not include venue searches.)
- Send email announcements and reminders based on Master Communications Calendar
- Collaborate with event chair(s) on communications with attendees and speakers
- Collaborate with event chairs on logistics grid
- Prepare printed materials: signs, nametags, one-page program, handouts provided by speakers or PSGA, etc.
- Prepare and send email invitations for program follow-up surveys (electronically through SurveyMonkey or similar service)
- Process registrations through online database
- Track attendance history
- Provide onsite meeting management under direction of committee, handling:
 - Onsite registration and membership signups
 - Audio-visual needs
 - Oversee room setup (unless otherwise agreed upon)
 - Catering arrangements
 - Distribution or placement of printed materials referenced above

Seattle Funders Forum Management (once annually; 100-150 attendees)

- Manage venue arrangements (contract & logistics setup)
- Send email announcements and reminders based on Master Communications Calendar
- Maintain matrix of Funders
- Send email confirmation to confirmed funders
- Track table stewards with direction from committee
- Prepare printed materials, signs, nametags, etc.
- Prepare and send email invitations for program follow-up surveys (electronically through SurveyMonkey or similar service)
- Process registrations through online database
- Track attendance history
- Provide onsite meeting management under direction of committee, handling:
 - Onsite registration and membership signups
 - Audio-visual needs
 - Room setup
 - Catering arrangements
 - Distribution or placement of printed materials referenced above

South Sound Funders Forum Management (once annually, Tacoma; 80-120 attendees)

- Send email announcements and reminders based on Master Communications Calendar
- Maintain matrix of Funders
- Send email confirmation to confirmed funders
- Track table stewards with direction from committee
- Prepare printed materials, signs, nametags, etc.
- Prepare and send email invitations for program evaluation forms (electronically through SurveyMonkey or similar service)
- Process registrations through online database
- Track attendance history
- Provide onsite meeting management under direction of committee, handling:
 - Onsite registration and membership signups
 - Distribution or placement of printed materials referenced above

Specialized Trainings (three to five times annually; 20-40 attendees)

Note: no onsite staffing required.

- Manage venue arrangements (contract & logistics setup)
- Send email announcements and reminders based on Master Communications Calendar
- Prepare and send email invitations for program follow-up survey (electronically)
- Process registrations through online database
- Track attendance history
- Arrange catering if requested

Other Event Support

Should additional types of events be planned by PSGA, an addendum to this scope of services may be agreed upon, including possible additional compensation.

PSGA Deliverables

PSGA agrees to provide final decisions and written content according to mutually agreed upon timelines. Specifically, the organization will:

- Recruit Board Members and committee volunteers to fulfill organization's needs in a timely manner
- Designate primary contacts for PSGA's promotional communications (e-blasts, newsletters, etc.). The primary contacts will be responsible for providing final approval before transmission by the management services provider.
- Follow mutually-agreed upon timelines and established deadlines
- Respond to requests from the management services provider within two business days unless other timelines have been mutually agreed upon
- Communicate any logistical support requirements or other special requirements in a timely manner
- Designate primary contacts for each event category and for functional areas (e.g., Treasurer is primary contact for Finances)

SPECIAL NOTES ABOUT SCOPE

1. **Confidential information:** All information acquired by the management services provider in the course of its agreement with PSGA shall be held in confidence, and cannot be used for any purposes other than those agreed to by the provider and PSGA.
2. **Ownership of intellectual property:** Any work products produced by the management services provider will be the property of PSGA unless otherwise agreed to. For example, PSGA will in perpetuity retain ownership of the website, database and materials contained within.
3. **Special projects or other tasks not specified in this scope:** In the course of the relationship between PSGA and the management services provider, one or both will encounter potentially additional tasks and projects not defined within this scope. If these work products are to be accomplished, they first should be mutually agreed upon and documented (along with associated procedures).

SUBMISSION PROCEDURE

Please follow the steps below in your submission. As grantwriters, we appreciate brevity and specific examples, and do not wish this procedure to be onerous. The word maximums are guidelines; don't waste your time if you're over by a little bit, or used fewer words than we offered.

Please send PDF, Word/Word-compatible and/or Excel/Excel-compatible files.

1. Present your Resume, CV or company history, including recent clients. You may substitute a link to a LinkedIn page, or provide a PDF or links for one or more web pages that offer this information.

2. Introduce yourself or your firm and discuss your approach to work and relationships with your clients. In particular, explain your involvement with nonprofit organizations and/or membership organizations. (250 words max.)

3. We expect you to be proficient in several major task areas (listed below). Please describe a special accomplishment in one or more of these areas (250 words max). If you expect to subcontract specific tasks, please identify them and subcontractors you are likely to choose.* (Please describe your past experience with any named subcontractor.)

- ❖ nonprofit financial management
- ❖ event production/coordination
- ❖ database, website and other technology management
- ❖ collaboration with volunteers
- ❖ other areas of association management, such as customer service for members and the public

4. Submit contact information for at least two references: clients or other organizations for which you have performed similar services. Briefly (150 words max) describe the relationship with each: did it work well? Why, and/or why not? Provide examples.

Deadline and procedure for proposals

Preference will be given to proposals submitted by Sept. 27, 2018. After that date, please contact us to learn whether proposals are still being accepted.

**** You may submit an incomplete proposal if the only missing element is your identification of a subcontractor and/or its estimated costs. Such information should be provided no later than Oct. 1, 2018, unless you present, and we accept, reasons for additional delay.***

All submissions and queries are to be directed to PSGA Search Committee at PSGA.search@gmail.com.

PSGA will reply upon receipt of your submission; if you do not receive a confirmation within 24 hours, please contact us again to confirm. Thank you for your interest!