



**Association for Communication Excellence (ACE)
In Agriculture, Natural Resources, and Life and Human Sciences**

**RFP FOR
ASSOCIATION MANAGEMENT SERVICES**

HISTORY OF ACE

Since 1913, ACE has been providing professional development and networking opportunities for professional communicators, educators, and information technologists working in the land-grant university system. Today, ACE is an international association of professionals who extend knowledge about agriculture, natural resources, and life and human sciences to a variety of audiences. Originally known as the American Association of Agricultural College Editors, today many of our members work for land-grant universities or agriculture-related organizations across the country and around the world. With nearly 400 members, we hold an Annual Conference, oversee a scholarly publication, run an annual Critique & Awards competition, and provide educational and networking opportunities through virtual Learning Communities.

ACE has a board of officers and directors who meet monthly to conduct association business. It has been managed day-to-day under a variety of strategies over the years, including university-based headquarters, association management organization, and executive director models.

The ACE website is: <https://www.aceweb.org/>

MISSION, VISION, STRATEGIC PLAN

Mission:

ACE develops professional skills of education, government, and research communicators and information technologists to extend knowledge about agriculture, natural resources, and life and human sciences to people worldwide. ACE derives its basic mission from the longstanding experience of land-grant universities within the United States, the U.S. Department of Agriculture, and equivalent institutions in other countries in delivering necessary information for improving the lives of all citizens.

To aid the delivery and use of practical ideas and services, and to increase the professionalism and ability of communicators, ACE will exist as a nonprofit organization to further the following objectives:

- a. Foster research in communication processes.
- b. Study and evaluate the effectiveness of ongoing information and education activities of public institutions.
- c. Provide forums for discussion of public issues related to the dissemination of agriculture, natural resources, life and human sciences, and related information.
- d. Provide or encourage the development of workshops, courses, and other educational activities aimed at increasing the skills of professional communicators in serving the needs of people and the institutions we represent.
- e. Stimulate and encourage innovation by communicators of public institutions, the various news media, and private industry in furthering a two-way flow of information with various audiences.
- f. Lead or assist in producing and distributing information in appropriate media to meet the needs of communicators and the people they serve.
- g. Establish criteria of professionalism for members and encourage universities, government agencies, and others to apply these criteria as guidelines in recruiting, employing, and promoting their communicators.
- h. Cooperate with other organizations and industries in furtherance of the ACE mission.
- i. Raise the profile of communicators so their expertise is recognized by their internal clients and administrators.

ACE 2015 Strategic plan:

https://www.aceweb.org/Resources/Pictures/2015_June/ACE2015StrategicPlan.pdf

RELATIONSHIP TO OTHER RELATED ORGANIZATIONS

ACE is an independent, international organization, but we have partnered on occasion with other agricultural communications organizations for our Annual Conference.

SUMMARY OF ASSOCIATION STATUS / CONCERNS

As university budgets and staff sizes have fluctuated, ACE has seen our membership numbers decrease in recent years. ACE's income derives primarily from member dues, member payments to enter the Critique & Awards competition, and registration fees for the Annual Conference. Loss of members puts ACE's financial stability and sustainability at risk. We need either to grow membership or to find a way to become stable and sustainable at the size we are now.

ACE is also in need of a comprehensive strategic plan. The ACE Board and other leaders are volunteers who typically invest much time in hands-on management of the organization's activities. This time commitment has sometimes made it difficult to find members willing to serve as Board members and leaders of committees and Learning Communities. It is our hope that turning more of these duties over to an association management company, land-grant institution, or individual will enable the Board and other leaders to focus on more strategic issues that support the success of our members in their profession.

One of ACE's goals has been to increase the number, value, and impact of professional development opportunities for our members. ACE leadership has considered establishing an accreditation program to recognize the professionalism of our members and to increase the prestige of our profession among

not only members and potential members, but also among university administrators and our internal clients within the university. In the past, ACE sponsored a Leadership Institute, an intensive, two-year leadership development program for ACE members. After two classes graduated from the program, it was discontinued because of low participation, which may have been due to the costs of the program and the time required to complete it.

TYPES OF MEMBERS

Membership is on an individual basis. Some members' dues are paid by their institutions, but many pay the dues themselves. Dues are primarily paid annually by January 1, but some members pay dues as part of the Annual Conference registration fee. There are six categories of membership, based on dues payments:

- **Active**, which includes the great majority of our members.
- **Active, First-year**, which includes members only in the first year of membership and offers a reduced rate for dues.
- **Active, Student/Recent Graduate** members, or full-time undergraduate or graduate students or those who have graduated within the past two years and who pay a reduced rate for dues.
- **Retired** members, who have retired from their professional positions.
- **Life** members, who are retired and have completed the payments required for Life membership (five times the annual dues for Retired members). This is now \$300 and can be paid all at once or over a three-year period.
- **Affiliate** members, or international members from a "Charter Country," where budgets and salaries preclude paying individual member dues. The charter group collectively pays for one active membership, which entitles them to one vote.

All members are eligible to vote in all organization-wide elections (qualifications: Charter Countries are allowed only one vote; Life members are not eligible to vote on dues increases). All members are eligible to hold office, except Retired, Life, and Affiliate members. The one exception is the position of Retirees Director, which must be held by a Retired or Life member.

DESCRIPTION OF LEADERSHIP STRUCTURE

ACE Officers are the **Vice President, President-Elect, President, and Past President**. The Vice President is elected from the ranks of Active members, then rotates up through all the positions, serving a one-year term in each. Officers must remain Active members throughout their four-year term.

ACE has six **Directors**, all of whom must be Active members and remain so throughout their terms, except for the **Retirees** Director. The Directors are elected to a one-year term as Director-Elect, then continue serving as Director for an additional two years. All Directors and Directors-Elect are members of the Board. The **Membership, Professional Development, Research, and Marketing** Directors all chair committees of members to assist them in planning and carrying out their responsibilities. The **Learning Communities** Director works with the leaders of ACE's Learning Communities, acting as their liaison to the Board.

The **Executive Director** is appointed by the ACE Board and is an employee of the organization. The Executive Director's duties also include serving as secretary for meetings of the Board and the membership. The Executive Director is a non-voting, *ex-officio* member of the Board.

The **Treasurer** is appointed by the Board and serves a three-year term. The Treasurer is a non-voting, *ex-officio* member of the Board and leads the Finance Committee.

The **Development Officer** is appointed by the Board and serves a three-year term. The Development Officer is a non-voting, *ex-officio* member of the Board and leads the Development Fund Committee.

The **Curator/Archivist** is appointed by the Board and maintains and shares with the ACE membership the archives and history of the organization. The Archivist is not a member of the Board.

The *Journal of Applied Communications (JAC)* **Executive Editor** is appointed by the Board and oversees the manuscript solicitation, review, and publishing process for the journal. The Executive Editor is not a member of the Board and is paid by ACE. This is a part-time position.

The **Learning Communities** are led, usually, by a Chair, a Vice-Chair, and a Vice-Chair Elect, but each Learning Community is free to determine its own leadership structure.

Currently, ACE's Learning Communities are:

- Academic & Research
- Diversity
- Electronic Media and Photography
- Instructional Design & IT
- Leadership & Management
- Marketing
- Media Relations
- Publishing & Graphic Design
- Social Media
- Writing

ACE's **Standing Committees** are: Membership, Development Fund, *JAC* Editorial Board, Professional Development, Finance, and Marketing. **Ad-Hoc Committees** include the Annual Conference Program Committee and the Nominating Committee, which are appointed annually. Other ad-hoc committees, task forces, etc., are appointed as needed by the ACE President.

DESCRIPTION OF MEETINGS

The ACE Annual Conference is held each summer in different locations around the country. Attendance is approximately 200 members. The conference includes professional development sessions, learning community meetings, and an awards presentation, in addition to the annual business meeting of the membership.

The next Annual Conference will be held June 13-16, 2017, in New Orleans, LA. More information is available here: <http://conferences.k-state.edu/ace2017/>

We are currently under contract to the Kansas State University Global Campus Conferences and Noncredit Programs unit for conference planning. This contract ends after the New Orleans meeting, in July 2017.

The ACE Annual Conference Program Committee's charge includes seeking sponsorships to support the Annual Conference. The success of this effort varies from year to year.

DESCRIPTION OF PUBLICATIONS

The *Journal of Applied Communications* is a scholarly research journal posted online four times per year. ACE supports the publication editor and web design for the journal. Submissions are uploaded online.

http://journalofappliedcommunications.org/images/stories/issues/2016/jac_100_edition_issue_3_full_issue.pdf

The ACE Membership Director edits and publishes via e-mail a monthly member newsletter, the *ACE Update*. The current issue of the newsletter can be found on the ACE website: www.aceweb.org

Neither publication accepts advertising.

SUMMARY OF CONTRACTS

Currently, ACE is managed by an Executive Director (through 2018), who is an ACE member employed by the University of New Hampshire. Her services are secured by a contract, paid by ACE to the University, for approximately 40 percent of her time. ACE also has a contract for conference planning, and the current agreement ends July 2017.

ACE has subscriptions to Wild Apricot (wildapricot.com), for membership management (e-mail lists, dues invoicing and payment) and web hosting, and to Submittable (submittable.com), for managing the entry, payment, and judging process for the ACE Critique & Awards competition.

The ACE Board has recently signed a memorandum of agreement with New Prairie Press for publication of the *Journal of Applied Communications*. ACE retains ownership of the journal, but many of the administrative and publishing duties will be taken over by the Press.

We do not lease office space or equipment.

SCOPE OF SERVICES

1. General Office

- a. Phone (hours). Answer phones 8-5 in your time zone, answering with "*Association for Communication Excellence*." Respond to member phone calls during normal business hours, within 24 hours.
- b. Fax. You will, on occasion, need a fax machine, although email is more common.

- c. Voice Mail. Your voicemail should have a personal message, identifying you as the management firm for ACE. Something like: *"This is ___ from the Association for Communication Excellence. I will return your call as soon as I am able . . ."*
- d. Email. Much of your work will be handled via email, and your email signature should indicate your affiliation with ACE. Respond to member emails during normal business hours or within 24 hours.

2. Member Support Services

- a. Accurately maintain and update the membership roster, database, and online directory.
- b. Send out reminders to ACE members for annual dues/membership renewal/ past due notices (would like capability to bill annually by date joined rather than calendar year.)
- c. Maintain organizational e-mail lists for the Learning Communities and State Representatives.
- d. Answer questions and provide assistance to ACE members, as needed.

3. Board Meetings and Board Support

- a. The Board meets twice a year face-to-face, and most other months via web technology. Software to support web video conferencing is needed.
- b. Location: The face-to-face Summer Board Meeting takes place just prior to the ACE Annual Conference, which is in a different location each year and usually takes place in June. The Fall Board Meeting is usually in October and the location is flexible. If your headquarters has meeting facilities, we could meet at your headquarters. Traditionally it has been held in the home state of the current president, or could be in the location of the following year's annual conference.
- c. Ensure newly elected board members receive proper orientation.
- d. Work with the ACE President to plan monthly board meetings (online). Work with the president to establish the agenda, and share the agenda with the board. Solicit reports as needed from Board members and others. Send agenda and supporting materials for meetings to Board members in advance.
- e. Work with the President to plan for two face-to-face board meetings annually (hotel and meeting facilities, breaks and meals as needed).
- f. Assist the Treasurer in financial reports and distribution prior to board meetings.
- g. Responsibility at board meetings: Take notes at each board meeting. Serve as parliamentarian, as needed, working with the Vice President.
- h. Distribute the minutes within a week after the meeting and follow up on any action items.
- i. Remind Board members of deadlines, upcoming meetings, and assignments.
- j. Provide the Board with consultation, as requested, regarding board and organizational matters.

4. Manage electronic voting for new officers and Board members annually and for other matters requiring voting, as needed.

5. Financial Management

- a. Working with the Treasurer, manage income and expenses responsibly to fulfill obligations in a timely manner, and maintain clear records of income and expenses.
- b. Fulfill accounting and annual tax preparation procedures.
- c. Process credit card payments for membership dues, contest submissions, conference fees, and other payments.

- d. Working with the Treasurer, make financial records available to the ACE Board members on a monthly basis.
- e. Working with the Treasurer, provide monthly updates, with two major reports at the summer and fall board meetings.
- f. Working with the Treasurer, prepare the annual budget for approval by the Board.
- g. Working with the Treasurer, monitor investment accounts and provide reports to the Board.
- h. Provide financial advice and recommendations to the Board, as requested.

6. Website Management

- a. Oversee website hosting. Ensure that URL registration is kept up-to-date.
- b. Maintain and update the ACE website, including calendar of upcoming events and offerings.
- c. Archive recorded professional development offerings for member access.
- d. Enable content updates and additions by Board members and leaders of Learning Communities and committees, as requested.

7. Support for the Annual Conference

- a. Arrange site visits and involve officers to determine conference location.
- b. Develop conference budget working with conference committee.
- c. Oversee hotel arrangements and negotiate contracts.
- d. Work with the Conference Program Committee to secure appropriate meeting space and facilities.
- e. Add and maintain pages to the website to promote the conference and allow for online registrations.
- f. Process conference registrations and payments by credit cards, purchase orders, invoicing, etc.
- g. Create the conference program and awards booklets.
- h. Transport conference materials (programs, awards booklet, name badges, etc.) and brand collateral (banner stand displays, signage) to the site of the conference, as needed.
- i. Provide conference registration/information desk and on-site support during the conference.
- j. Assist with ACE Development Fund silent auction and other conference activities, as needed.
- k. Coordinate the ACE Business Meeting and the participation of officers and Board members in the agenda. Prepare slides to present content to membership.

8. Support for the annual Critique & Awards program and ACE Awards

- a. Process award submissions and entry fees, and maintain a record of entries.
- b. Provide judges with entries to be judged and payments.
- c. Communicate with judges to receive results.
- d. Communicate results to leadership and generate award announcements for members.
- e. Remind members and leadership of deadlines for nominations for ACE Awards. Manage nominations and share with appropriate officers and the Board for final selections.
- f. Work with ACE President-Elect to prepare the awards booklet content.

9. Management Company Facilities

- a. Storage requirements: Small storage needs for holding notes, financial documents, marketing and organizational identity collateral, etc.

- b. Meeting space: A meeting room that holds about 15 people would be helpful, but is not required.

10. Publication/Communication Support

- a. Solicit contributions from Board members and others, as appropriate, and produce and distribute the monthly *ACE Update* electronic newsletter.
- b. Assist with posts and monitoring ACE's social media accounts.

11. Other Support Services (desirable, but not required)

- a. Monitor work of standing and ad-hoc committees and report progress to the Board.
- b. Advise the Board regarding fundraising and potential donors, manage sponsorship solicitations, and provide a system for managing fundraising campaigns, as requested.
- c. Assist with strategic planning.
- d. Provide marketing consultation and support for the Marketing Director.
- e. Assist with efforts to grow organization membership.

APPENDIX

1. 2016 Fiscal Year ACE Financial Accounts Summary, attached.
2. Investment accounts, attached.
3. FY 2016 Budget and 2017 Proposed Budget, attached.
4. Example of spreadsheet shared at Board meetings, attached.
5. Constitution: <http://aceweb.wildapricot.org/ace-constitution>
6. Bylaws: <http://aceweb.wildapricot.org/policies-and-procedures>
7. ACE Strategic Plan:
https://www.aceweb.org/Resources/Pictures/2015_June/ACE2015StrategicPlan.pdf
8. ACE Update, electronic member newsletter: www.aceweb.org
9. ACE 2017 Annual Conference: <http://conferences.k-state.edu/ace2017/>
10. ACE Facebook page:
<https://www.facebook.com/Association.for.Communication.Excellence.ACE/>
11. Association brochure and push cards, attached.

INFORMATION REQUESTED OF INTERESTED PARTIES

1. A description of how you, your land-grant college/university, your department, or your association management company, is organized to serve our clients.
 - a. Size of staff.
 - b. Skills/expertise of staff.
 - c. Description of staff working on our account.
2. An indication of your ability to provide support for each aspect of the Scope of Services section above. Also indicate services that you typically outsource and/or would recommend outsourcing.
3. An explanation of the company's experience in related industries or areas of concern.
4. A clear explanation of how your firm charges for its services and how these expenses will fit into our budget.
5. The qualifications and responsibilities of the account executive who will serve our association.

6. A description of the types of software you would use for our account, such as for accounting, email lists, website, and award submissions.
7. Verification of insurance and bonding.
8. A description of how your association management company will meet the immediate challenges and fulfill the future goals of our association.
9. A suggested transition schedule.
10. Costs for the transition activities.
11. A representative client list and references.
12. Financial references.

TIMELINE

The following timeline will apply to this process:

Final receipt of all proposals date	April 3, 2017
Initial screening of proposals by search committee	April 17, 2017
Due diligence by various members of the search committee on proposals taken to the next level	April and May
Presentation of one or more proposals to the Board of Directors	June 2017
Selection and negotiation of contact specifics	Fall 2017
Transition process	January through June 2018
Formal start date	June 2018

If the timeline changes, the Search Committee will keep you apprised.

CONTACT INFORMATION

For questions regarding this RFP, please contact:

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