

## NAWBO Richmond

### Description of Services

Selected Candidate agrees to serve as the Chapter Administrator, by providing association management services to NAWBO Richmond. Specifically, the scope of services that Selected Candidate provides includes:

#### Leadership and Operations:

- Transition
- Confirm all federal and state paperwork
- Confirm all tax information is in order
- Review by-laws and NAWBO Richmond board meetings and operations
- Complete policy and procedure review as well as plan of work for the year
- Review board, nominations process and any need for succession planning for continual leadership
- Review annual association budget in addition to those individual budgets for events, etc.
- Review all contracts, use of software, platforms, etc.
- Review the upcoming calendar
  
- Administration
- Serve as the primary contact for NAWBO Richmond for National NAWBO, responding to requests for information on Chapter activities, etc.
- Provide general administrative support to the NAWBO Richmond Chapter President and other Board members as needed
- Ensure key NAWBO Richmond filings and renewals are met
- Serve as the primary repository for the NAWBO Richmond Chapter's electronic and paper records
- Create and manage shared electronic file storage systems to be utilized by the NAWBO Richmond Board of directors, updating access annually with transition of Board members
- Store Chapter's various promotional items, collateral, etc. to include display banners, promotional take-aways, and printed collateral
- Assist with the preparation of periodic online surveys to key constituencies, including an annual Member/Program survey
- Other duties as assigned
  
- Board Staffing & Development
- Serve as the staff liaison for the NAWBO Richmond Board of Directors
- Prepare and provide support for NAWBO Richmond Board of Directors, by completing the following services in preparation for NAWBO Richmond Board monthly meetings:
  - o 1-week pre-meeting: Send meeting reminder email to all NAWBO Richmond Board of Directors with meeting minutes and call for Committee reports & agenda items
  - o 1-2 days pre-meeting: Circulate draft agenda and committee reports to the NAWBO Richmond Board.
  - o 1-week post-meeting: Email meeting minutes to the NAWBO Richmond Board for review and request and edits or revisions by date-set.
- Support the NAWBO Richmond Board of Directors' board development efforts
  - o Work with NAWBO Richmond Board members to update the Board job

- descriptions annually
- Provide orientation to incoming NAWBO Richmond Board Members, specifically regarding Board policies and upcoming events
- Prepare Board binders and other orientation materials at the direction of the NAWBO Richmond Chapter President
- Board Nominations
- Serve as the staff liaison to the NAWBO Richmond Nominations Committee and the nominations process in the following ways:
  - Update NAWBO Richmond Board Interest Forms
  - Field inquiries from prospective NAWBO Richmond Board Members
  - Process completed Board & Committee interest forms and track NAWBO Richmond Board Prospects
  - Work with the NAWBO Richmond Immediate Past President to ensure the National Committee is meeting the timeline for completion of Chapter and Foundation Board slates, in accordance with Chapter By-laws
  - Oversee official voting by Chapter members on the NAWBO Richmond board slate, including its distribution, collection and tallying of proxies
  - Update national NAWBO, Richmond Chapter website and email distribution list with key information on new NAWBO Richmond Board Members

#### Communications:

- Create a communications calendar and strategy, to incorporate current (e)newsletters, social media and website
- Phone, Email, and Mail Inquiries
- Serve as the point of contact for all inquiries to NAWBO Richmond via phone, fax, email or US mail
- Respond in a timely manner to inquiries or forward to the appropriate Board members as needed
- Periodically review answering service script to ensure accuracy. Provide answering service with information on upcoming events to update script.
- Website Management
- Create website posts and review website periodically to ensure the promotion of all NAWBO Richmond programs and special initiatives as well as updated content as requested by the Chapter President, Marketing Chair and Board
- Create log-in credentials for all new Chapter members and respond to login issues for existing members
- Maintain Events Calendar on the NAWBO Richmond website to include Chapter events as well as other local networking and professional events
- Electronic Communications
- Prepare and disseminate e-blast communications to targeted constituency groups re: upcoming programs or specific initiatives
- Maintain updated constituency distribution lists to ensure accuracy
- Prepare and disseminate quarterly newsletter in cooperation with the NAWBO Richmond Chapter President and Board of Directors
- Social Media
- Work with the NAWBO Richmond Marketing Chair to utilize properly NAWBO Richmond social media channels to communicate events, programs and messages

#### Programming:

- Program Support
- Provide support to the NAWBO Richmond Board of Directors to confirm the program

- schedule for the upcoming program year
- Manage the planning and execution of the NAWBO Richmond Chapter's programs including but not limited to:
  - o Plan Dates, Locations, Programs in conjunction with the NAWBO Richmond Board of Directors
  - o Coordinate Promotion, Registration and Sponsorship
  - o Manage Budget & Logistics (RFPs/Food & Beverage/A/V/Venue)
- Manage internal program and event planning in conjunction with the NAWBO Richmond Chapter President, Board of Directors and necessary Committees
- Sponsor Support
- Coordinate annual sponsorship appeal in conjunction with the NAWBO Richmond Immediate Past President
  - o Mail renewal letters and asks to new prospective sponsors
- Track sponsor solicitations
- Coordinate invoicing with ACP Resources
- Track stewardship detail for all sponsorships, including contact information, recognition preferences, current logo, etc.
- Ensure that all sponsor deliverables are being met
- Maintain current sponsor roster and records of past sponsors for future solicitations
- Periodically review and update corporate partner print and online collateral to ensure accuracy
- Identify opportunities for grants from corporate foundations aligned with NAWBO mission and programming and assist in or lead grant application fulfillment
- Masterminds Support
- Work with the Immediate Past President and Program facilitator to support the annual cycle for the Mastermind(s) group
  - o Prepare communications to promote interest
  - o Process applications and any associated fees

#### Financial:

- Financial Reporting
  - o Coordinate with ACP Resources monthly to provide financial reporting for the NAWBO Richmond Chapter Treasurer in advance of the NAWBO Richmond monthly board meeting to share with board members
  - o Work with ACP Resources and the NAWBO Richmond Board to review and implement any internal procedures and checks and balances
  - o Work with ACP Resources and any other contractors to complete annual audit/tax preparation as necessary
- Budgeting
  - o Assist the NAWBO Richmond Chapter Treasurer in compiling a proposed annual budget for review/approval by the Board
  - o Work with the NAWBO Richmond Chapter Treasurer to develop long term strategies to create non-dues revenue to diversify and support NAWBO Richmond

#### Membership:

- Recruitment
- Initiate "Welcome" and orientation process when a new member joins the NAWBO Richmond Chapter, including a prompt welcome email with log-in credentials and prompt notification of the NAWBO Chapter President and Membership Chair for follow up

- Respond to individual inquiries regarding membership
- Answer basic questions from prospective members and refer to the NAWBO Membership Chair for additional follow up
- Retention
- Initiate “Welcome back” process when an existing member renews, including a prompt “welcome back” email and prompt notification of the NAWBO Richmond Membership Chair for follow up
- Reports
- Provide the NAWBO Richmond Membership Chair and other Board members updated membership information as needed by running reports from the national NAWBO database

## **Payment**

NAWBO Richmond will agree to pay an hourly rate for the service of Chapter Administration. Compensation will be agreed upon during the interview process based on individual skill set and experience level.

Additionally, NAWBO Richmond will reimburse Selected Candidate for any reasonable expenses incurred during its representation agreed to by both parties. Expenses can include but are not limited to postage, meals, lodging and mileage.

Selected Candidate will submit expense reports to NAWBO Richmond itemizing all expenses. Mileage will be reimbursed at current IRS rate. All other approved expenses will be reimbursed at cost.

NOTE: No legal advice or services are rendered under this agreement. Selected Candidate services shall be provided in compliance with all laws of the Commonwealth of Virginia.

## **Contact Information**

All proposals and questions related to the RFP can be sent via email to richmondnawbo@gmail.com