

## **Request for Proposal**

### **Chapter Administrator: Ely Chapter, Lambda Alpha International**

The Ely Chapter, Lambda Alpha International is seeking proposals for a part time Chapter Administrator.

Lambda Alpha International, the Honorary Society for the Advancement of Land Economics, was founded in 1930 under the leadership of the renowned land economist and champion of academic freedom, Northwestern University professor Richard T. Ely. As an honorary society, it provides a forum for the study and advancement of land economics where the “sifting and winnowing” of ideas takes place in an atmosphere of mutual respect. There are approximately 350 active members (and over 500 total members) in the Ely Chapter based in the Chicago metro area.

For more information on the Ely Chapter please visit our website: <https://www.ely-chicago.org/about-lai/ely-chapter-overview/>.

The Ely Chapter is organized as a not-for-profit 501(c)6 organization. It operates with a Board of Directors (“Board”) and a part time Chapter Administrator. The essential functions of the Chapter Administrator are attached. The Chapter Administrator would be an independent contractor of the Ely Chapter and would operate with an annual contract for the period January 1, 2018 to December 31, 2018, which contract could be renewed for an additional period by mutual agreement of both parties.

Written proposals are requested by no later than **October 25, 2017** and should include:

- A statement of understanding of the position requirements and how the needs of the Ely Chapter can best be addressed.
- Qualifications of the proposer and relevant experience.
- Fee proposal. Please provide a proposed fee for the described services. Previously the Chapter Administrator was compensated through an annual fee paid in installments, plus reimbursement for additional services, travel expenses including parking, tolls, and mileage in a personal vehicle at the applicable IRS rate, and other expenses approved by the Board.

Questions should be addressed to Rob Gamrath, Ely Chapter President, at [robgamrath@gmail.com](mailto:robgamrath@gmail.com) or 312-613-3636.

## **Ely Chapter Lambda Alpha International Chapter Administrator Essential Functions**

1. Administrative
  - A. Report directly to the Board of Directors and support the activities of the Officers and committee chairpersons.
  - B. Assist the Chapter President with the planning of the annual Board Retreat meeting in January, including the agenda and materials for the meeting and securing the dinner venue for the reception after the meeting.
  - C. Maintain minutes, financial records and other documents of the Ely Chapter and Board of Directors.
    - a. Minutes and board agenda material are to be provided within five (5) business days preceding the Board of Directors meeting.
  - D. Assist with or perform all duties necessary to coordinate Ely Chapter events, including but not limited to: all monthly lunches (typically 6), Chautauquas (explained below), the holiday party, new member reception, salons, pop-up networking events, and the summer field trip, as well as the initiation banquet, monthly board meetings/annual retreat, including the following responsibilities:
    - a. Attend all Chapter events, including Board meetings and Programs.
    - b. Secure event venues and negotiate contracts. Work with venue to determine appropriate menu and guarantees.
    - c. Develop event budgets.
    - d. Arrange for audio-video equipment and media personnel if necessary, including photographer.
    - e. Manage all print media, publicity and advertising (described below).
    - f. Coordinate member registration (through Event-Brite or similar product), check-in at events, and name badges.
    - g. Post each event on the Ely Chapter website.
    - h. Send event details into LAI for distribution to members of the entire organization.
    - i. Manage the event or programs by sending out emails and reminders, preparing seat assignments if required, arranging special meal requests, preparing name badges, and other tasks necessary to achieve a professional, smooth-running event.
    - j. Provide AV services including set up of laptop and projector for presentations as needed (screen is generally provided by the

- venue). Administrator is responsible for obtaining presentations in advance with the assistance of the VP Programs, loading presentation onto the laptop, and determining that all links and media within the presentation function.
- k. Send by email a survey requesting attendee feedback about each event.
  - l. Produce or update Power Point presentations using appropriate branding.
    - i. Create or update a presentation for all luncheons highlighting sponsors, upcoming events, and any other pertinent information (approximately 4 slides).
    - ii. Create or update a presentation for the New Member Initiation Banquet, in conjunction with the President and VP Membership that includes information about each new member, award winners, LAI, and the Ely Chapter (approximately 80 slides).
    - iii. Create or update a presentation for the New Member Reception in conjunction with the President and VP Membership (approximately 15 slides).
  - E. Assist and perform all administrative duties necessary to support the Ely Chapter Officers and/or committee chairpersons, including but not limited to: President, President-Elect, Secretary, Treasurer, VP Membership, VP Communications, VP Programs, Special Events, Initiation Banquet, Education, Awards, Technology, Sponsorship and Members at Large.
  - F. Assist and perform all administrative duties necessary to provide sponsor benefits , including updating website, tracking payments, having sponsor banner printed, providing reserved seating at events, printing table tent cards, etc.
  - G. Assist with the development and monitoring of the Chapter Strategic Plan. There is a current Strategic Plan in place.
  - H. Assist with periodic review, update and creation of the Chapter by-laws and policies governing the Board (e.g., Financial Policy, Communications Policy, etc.).

## 2. Budget/Finance

- A. Work with the Treasurer and Accountant/Bookkeeper to maintain all financial records of the Ely Chapter, payment of invoices and general reporting.
- B. Assure that Ely Chapter is in compliance with the filing requirements of the state of Illinois and Internal Revenue Service regarding Illinois Not-for-Profit corporations.

- C. Prepare membership dues for new members. Work with Lambda Alpha International regarding all membership renewal issues.
  - D. Assure all necessary financial reports are sent to Lambda Alpha International.
  - E. Pay all invoices in accordance with the Ely Chapter Fiscal Policy.
3. Communication/Liaison
- A. Promptly respond to all telephone, fax and e-mail communications related to Ely Chapter.
  - B. Act as the liaison between Lambda Alpha International Ely Chapter and the membership to resolve membership issues.
    - a. Work seamlessly with the Executive Director of Lambda Alpha International regarding all International financial, membership and administrative reporting and reconciliation matters.
    - b. Proactively publicize all programs and activities of the Ely Chapter through website postings, e-mail communications, a master event calendar, and other formats as determined by the Board.
  - C. Provide all necessary communications to the membership by e-mail or other format.
  - D. Maintain the chapter website and download updated member information from the LAI Website at least every 30 days. Coordinate with the Ely Chapter IT consultant as needed.
  - E. Ensure that the website information is current.
  - F. Actively maintain website by uploading presentations, photographs, sponsors and other Chapter materials.

#### Essential Skills

- ◆ Strong communication skills and experience in working with non-profit Boards.
- ◆ Proficiency in Microsoft Office Products including Outlook, Word, Excel, Power Point; familiarity with use of email systems for routine communications with membership.
- ◆ Familiarity with WordPress for real time website updates including Chapter events and news.
- ◆ Proficiency in financial reporting using QuickBooks.
- ◆ Event planning experience.

#### **Frequently Asked Questions Ely Chapter, Lambda Alpha International Chapter Administrator**

## Event Schedule (Administrator attends all events).

- **Lunch Programs.** Events are scheduled on the third Wednesday of the month, typically in January, February, March, April, September, and November. Currently, lunch programs are held at Petterino's restaurant, Chicago, beginning at 11:30 am, and ending at 1:30pm.
- **Initiation Banquet.** Black tie optional dinner held in June (dates through 2020 have already been contracted), currently held at the Peninsula Hotel. Approximately 50 to 60 new initiates are inducted each year. Overall attendance is typically 200-225.
- **Chautauquas.** Longer in-depth program held either early in the morning (breakfast) or later in the afternoon (cocktails/appetizers), e.g., from 7:00 am-9:30am, or 4:30pm-7:00 pm. The program is in lieu of a lunch program in the spring (May) and fall (October) (unless a Salon (see below) is conducted and then just once a year). Location varies, but typically in downtown Chicago.
- **Holiday Party.** Social event in the late afternoon. Date is generally the second Wednesday of December (cocktails/appetizers). Location has been the Hotel Palomar for the last two years. If the Board assists in determining the venue the Administrator is responsible for determining the logistics.
- **New Member Reception.** July, late afternoon. Approximately 5:00pm-7:30pm (Cocktails/appetizers). Location varies. Generally the Board assists in determining the venue, with the Administrator working out the logistics.
- **Summer Social/Tour.** August. Event is organized by the Board/VP of Programs with logistics worked out by the Administrator. Generally the third week of the month. The event varies from year to year but usually is a field trip to visit a project or site of interest.
- **Sponsor Luncheon.** Event organized by the Administrator with assistance from the Board to thank sponsors for their participation and receive feedback on the sponsorship program and potential improvements.
- **Pop-Up Networking.** Social event held periodically at a member's office. The Administrator does not attend but does coordinate details including registration, nametags, etc.
- **Salon.** The administrator does NOT attend this event but works with the Board designee to determine venue (held at various member's houses), menu, and assign participants to location. The Salon can be in place of a monthly luncheon program.
- **Board meetings.** Monthly meetings held on the second Wednesday of each month, from 8:00am-9:30am. Location is generally the office of the President, downtown Chicago location.

**Committee/Board Support.** The Board acts with a number of standing committees, including Programs, Communication, Membership, Awards, Sponsorship, and others. The Administrator attends committee meetings as needed, and prepares minutes/summary of the meeting including action items. The Administrator may be asked to maintain any documents produced by a committee and support the resulting programs and events. For example, the Awards Committee recommends annual award winners for the Initiation Banquet, and the Administrator will assist with securing recognition plaques, and maintaining the list of awardees from year to year. Also, the Membership Committee reviews all new member nominations and the Administrator will create and maintain a spreadsheet with all new member information including contact information, employer information, and sponsor/co-sponsor details. The Administrator will also track payment of dues for new members, follow up with the initiates to secure photos, and obtain from Lambda Alpha International the membership pins and certificates.

There may be special projects from time to time, for which additional compensation would be negotiated. None are contemplated at this time.

**Bookkeeping/Accounting/Taxes.** Ely Chapter will retain the services of a bookkeeper/accountant who will be responsible for maintaining the financial records of the Chapter. This includes monthly bank reconciliations and ensuring necessary tax returns are filed and timely issuance of 1099's. The Administrator should have a familiarity with basic bookkeeping and QuickBooks Online. The Administrator will work with the Bookkeeper/Accountant to confirm that all entries are made and checks prepared. The Bookkeeper/Accountant prepares monthly financial reports, in addition to event specific financial reports. The Bookkeeper/Accountant creates an annual budget worksheet to aid the Administrator, Treasurer and President in budget preparation. The annual budget of the Ely Chapter is approximately \$75,000. Receipts and disbursements average 5-10 per month. Checks are signed by the Administrator, with amounts over \$2,500 requiring approval from the Treasurer.

Note: The Ely Chapter would consider a proposal from a Chapter Administrator candidate that includes bookkeeping/accounting as part of the regular functions. If such a proposal is made, please clearly indicate the cost for such services.

**Event Registration.** All registration is intended to be on-line, through EventBrite, with the exception of a few members who may need to pay by check and be added by the Administrator to Eventbrite. There is currently no on-site registration.

**Membership Renewals.** Annual membership renewals are through Lambda Alpha International. The Administrator is the liaison between the members and the International office.

**Office Space.** The Administrator is not required to provide office space, and may operate from home. Office expenses not covered in the compensation include office space, storage space, and cell phone.

**IT/Webpage.** The Ely Chapter Administrator updates the website, with limited assistance from an IT service firm on an as-needed basis (normally no more than an hour a month). The IT service firm provides “help-desk” services for members who experience difficulties with the Ely Chapter member database. The Chapter Administrator would work with the Programs and Communications Committees to upload the content and distribute it to the membership via email or other social media (e.g., Linked-In).

Note: The Ely Chapter would consider a proposal from a Chapter Administrator candidate that includes IT services as part of the regular functions. If such a proposal is made, please clearly indicate the cost for such services.

**Transportation/Automobile.** The Chapter Administrator is responsible for transportation to all in-person meetings and events, whether by personal automobile or other means of transportation. Reimbursement for transportation expenses will be as described above.