

## **PGI Request for Proposal –Membership Services Manager**

Request for Proposal (RFP) for the position of Membership Services Manager

The current contract for the position of Membership Services Manager will end in December 2022. We are opening a bidding process to all interested parties to respond to an RFP for the position. This contract represents the largest multi-year contract that the PGI currently has and as such, we believe it should be open to any member interested in the position.

The PGI will accept proposals for the award of a two-year contract starting January 1, 2023 and concluding on December 31, 2024. At the Board's discretion, the contract may be extended once for an additional two-year period. Should the Board decide not to extend the contract, it will be opened for bidding in the fall of 2024.

The PGI requires the contractor to work on a part time basis throughout the year processing memberships, coordinating, and running the registration desk at its annual convention with hours as established by the Board of Directors. Compensation for this work is \$30,000 per year plus reimbursement of actual expenses incurred conducting PGI business and partial reimbursement of expenses incurred by adding the PGI workload to an existing office (if necessary).

The ideal candidate will have been a PGI member for a number of years prior and familiar with PGI operations in general, including the annual convention.

Timeline:

This RFP will be published in the 2022 post-convention PGI Bulletin. Submissions will be accepted from November 1<sup>st</sup> through 31<sup>st</sup>, 2022. All inquiries and submissions should be in written form and sent via email to the PGI Secretary-Treasurer at [Treasurer@pgi.org](mailto:Treasurer@pgi.org).

Scope of Work:

The PGI prefers a contractor that has experience in all aspects of running and maintaining an office for membership services. In general, the winning contractor must have an excellent customer service presence as they will be the initial contact for all current and/or perspective members of the PGI. Excellent computer skills and an in-depth knowledge of Microsoft Office suite of products is required. The contractor must maintain an office and answer the main PGI phone number during regular business hours, 9am-5pm Eastern Time.

In addition to these general requirements, the following requirements must be addressed in the winning bid:

- A. Maintain the membership database in conjunction with PGI's on-line IT support contractor and provide Board members with updates once each month and at other times upon request. Note that at present, the PGI membership/convention registration interface is being updated. Additional responsibilities may be required after the new system is fully operational.
- B. For all financial transactions, make deposits to a bank account or process credit card receipts to a merchant account, both accounts maintained by the PGI Secretary-Treasurer and within five

business days of depositing or processing these financial transactions, accurately report those transactions on predefined reports to the PGI Secretary- Treasurer and the PGI bookkeeper.

- C. Complete an application with CSI, the PGI insurer, as required, to be covered under the contractor dishonesty insurance policy.
- D. Maintain a phone number, to be published in the PGI Bulletin and on the PGI website, which members and those applying for membership may call and reach you directly, or have their calls returned by the following business day.
- E. Attend any meetings called by the Board for planning and other purposes.
- F. Staff, with additional help as required, budgeted, and approved by the Board, the registration desk at PGI conventions, for all the hours it is open, as established by the Board of Directors. At the registration desk, duties will include, but are not limited to:
  - i. Preparation and issuance of credentials
  - ii. Acceptance of payments
  - iii. Maintaining the on-line membership database as new members are accepted (this includes validation of membership expiration and “clean up” of database to eliminate multiple inactive member accounts); and,
  - iv. Provide an accounting to Board members, upon request and within three business days of the close of the convention of: numbers of members registered, family members registered, and fees paid.
- G. Maintain a storage facility for MSM paperwork and materials that are offered for sale to the PGI membership with an accurate inventory of all the PGI materials contained within.
- H. Provide the PGI Board 30 days’ notice for any planned absences, vacations, or other events planned to exceed two business days, and schedule said absences as far in advance as possible, and, when necessary to defer to Board requests to avoid absences during critical time periods.
- I. Work with the Director(s) of the PGI Display Operator Course to issue four types of credentials (Course Attendance, Course Completion, Certified Display Operator, Certified DOC Trainer) upon request by the Chair of the Display Operator Course and to maintain a complete data base of all credentials issued, by name, contact information, and date issued.
- J. Update and maintain PGI Social Media presence on Facebook, Instagram, Twitter and the Whova app.
- K. Provide a monthly review of the PGI website to the VP of Communication.

## Evaluation Criteria

The position of the Membership Services Manager reports to the Secretary-Treasurer, but the entire PGI Board will be involved in reviewing the returned proposals.

Please include:

- a. A table of contents for your proposal
- b. Detailed description of your experience and why you would be a good fit
- c. A list of references

Also include any areas of improvement or direction that your skill set could bring to the Membership Services Manager's position. For example: office automation, recruitment drives and marketing drives. In short, anything to bring the cost of servicing members down and to help increase PGI membership.