



**New Mexico Association  
of Nurse Anesthetists**

**Request for Proposal of  
Association Management Services**

**Due Date for Proposal in response to this Solicitation:**

**November 30, 2021**



## New Mexico Association of Nurse Anesthetists Request for Proposal of Association Management Services

### **PURPOSE STATEMENT**

The New Mexico Association of Nurse Anesthetists (NMANA) organization is accepting proposals from qualified consultants/businesses to provide association management services. We invite you to submit a proposal by [November 30, 2021](#), for consideration.

### **BACKGROUND**

NMANA is a New Mexico 501(c)(6) nonprofit corporation. NMANA is comprised of 260 members who are Certified Registered Nurse Anesthetists (CRNAs). NMANA has continued in the forefront of advancing the profession of CRNAs whose members work in every conceivable setting in New Mexico: urban, rural, and military duty.

NMANA is affiliated with the recognized national organization of the American Association of Nurse Anesthesiology. NMANA board of directors is in search of management services that can support its ongoing efforts.

Management services would include communications, website/Facebook updates, Board management, strategic planning, committee management, financial support, membership management, governance, meeting logistics, and board election support. The structure of the organization includes a Board of Directors who meet no less than quarterly. Committee structures are also in place.

### **TIMELINE OF EVENTS**

The timetable below represents NMANA's best estimate of the schedule for this specific RFP process. If any event of the timetable is significantly delayed, the rest of the timetable dates may be adjusted accordingly. All offerors will be advised promptly of any changes in the timetable.

<b>KEY EVENTS</b>	<b>DUE DATE</b>
RFP Submission	By November 30, 2021
Interview Period	Week of December 8, 2021
Final Selection for Management Services / Contract Negotiation	Week of December 15, 2021
Expected Start Date	January 1, 2022

## **SCOPE OF SERVICES**

Management services for NMANA is anticipated to be an average of 12-15/hours per month. List of requested services as detailed below:

### **A. Administration**

1. Maintenance of dedicated mailing address, email address and phone number for NMANA.
2. Communication Resources: internet, email, answering telephone/voice mail/email inquiries, and cell phone text access.
3. Maintain association calendar and pertinent records
4. Plan and recommend to the Board of Directors policies and procedures in alignment with best practices in the nonprofit community.
5. Manage NMANA's general liability insurance plan: ensuring policy is current.
6. Publications and public relations: layout, edit, publish and distribute a biannual online Association Newsletter.
7. Website maintenance and Social Media tasks to include: overall website updates, general maintenance, updating association calendar of events, and assist with PayPal payment support as needed.

### **B. Governance**

1. Manage Board meetings, notifying board members of board meeting date and time.
2. In conjunction with NMANA President, develop board meetings agenda in accordance with association ongoing efforts.
3. Assist with maintenance of and updates to Articles of Incorporations, Bylaws, Policies and Procedures Manual, and other corporate records.
4. Maintain minutes of all Board and supplemental meetings.

### **C. Finance and Accounting**

1. Financial management consistent with generally accepted accounting principles to include:
  - a. Account payables and receivables
  - b. Monthly reconciliation of 501(c)(6), political action committee funds, PayPal account funds, and monthly financial statements
  - c. In coordination with Treasurer, monitor investment account
  - d. Provide assistance of association budget development
  - e. Prepare and file appropriate annual reports to New Mexico Secretary of State and Bernalillo County Assessor.
  - f. Overall support in matters concerning Political Action Committee compliance, regulations, and reporting.
  - g. Oversee filing of annual forms for nonprofit organizations (990), issue annually 1099 forms to unincorporated vendors, and file Form 1096 to the IRS.

#### D. Membership Services

1. Management and maintenance of the membership database
2. Assist with preparation of membership reports as requested
3. Maintain accurate membership contact information and contact preferences
4. Maintain effective and economical direct mailing services.
5. Service member and public inquiry.

#### E. Support of Board and Committees

1. Hold regular communication with NMANA Executive Committee.
2. Provide administrative support for the Board and Committee Chairs.
3. Maintain an accessible archive of association documents, update the administrative manual.
4. Foster leadership and governance skills among directors and officers.
5. Facilitate annual board elections.
6. Coordinate and effectuate annual business meeting requirements.
7. Submit grant applications, as directed by the board (up to 3 times per year).
8. Electronic voting or surveying

#### F. Strategic Planning

1. Construct and implement strategic planning session agenda, goals, timelines, and ensure executive board members are involved.
2. In conjunction with board of directors, finalize and distribute strategic plan of action for review and implementation.

#### G. Annual Membership Conference Planning

1. Event planning services for an annual conference including but not limited to planning, budgeting, contracting, promoting, securing speakers, obtaining provider number from AANA with proper documentation prepared, on-site administration, catering, financial oversight, purchase supplies, management of registrations, coordination of speaker and volunteer arrivals, needs, and tasks, coordination of A/V needs, coordination of hotel requirements and banquet orders, preparation and coordination of signage and agenda packets, process attendee registration reports and payments, payment of invoices and deposit funds, general attendee assistance, and final reports to the Program committee and Board of Directors
2. Follow up with notification to AANA of all CEU credits earned by attendees and provide CEU certificates to attendees
3. Develop onsite materials and conference program booklet
4. Distribute and collect attendee and exhibitor surveys

5. Prepare speaker contracts, coordinate travel logistics, and prepare honorarium payments

## **GUIDELINES FOR PROPOSAL PREPARATION AND SUBMISSION:**

### **A. Format**

1. The preferred proposal format is electronic and is to be e-mailed.
2. The required e-mail submission format should be a Microsoft Word Document or .pdf file format.
3. Submissions are to be submitted to:

Angela Frietze, CRNA  
NMANA President  
Email: [afcna70@gmail.com](mailto:afcna70@gmail.com)

### **B. Information to be included in proposal:**

1. Description of how your company is organized to serve its clients.
2. Describe your ability to provide support for each aspect of the Scope of Services section above. Include descriptions and samples of services that can be expected.
3. Indicate any services that are typically outsourced.
4. An explanation of the company's experience in related industries or areas of concern.
5. A clear explanation of the cost of services being requested and estimates for any other expenses.
6. Include resume with relevant experience of key staff and management personnel who will serve our association.
7. Provide two to three current corporate references, including company name, contact name, title, email address, telephone number and brief client relationship summary.
8. Provide a complete list of all current clients for whom you provide either professional consulting, association management, or lobbying services

## **SUBMISSION OF QUESTIONS, CLARIFICATION REQUESTS**

Questions regarding contractual terms, scope of service conditions, proposed format, or general questions are to be directed to:

Angela Frietze, CNRA  
NMANA President  
Email: [afcna70@gmail.com](mailto:afcna70@gmail.com)