

# **Request for Proposals Association Management International Fruit Tree Association**

## **INTRODUCTION**

The International Fruit Tree Association (IFTA) seeks proposals from individuals or management companies to provide executive management and staffing functions effective no later than January 1, 2018.

## **BACKGROUND**

“IFTA was established in 1958 to promote an understanding of the nature and use of dwarf fruit trees through research, education and dissemination of information.

The current IFTA vision is “Leading global tree fruit innovation.”

IFTA conducts an annual winter educational conference, publishes the Compact Fruit Tree journal, conducts an annual summer orchard tour and conducts an international study tour every second or third year. IFTA also provides management support and research direction for the IFTA Research Foundation.

IFTA has an annual budget of between \$500,000 and \$550,000.

IFTA has about 600 members.

IFTA currently consumes about 375 staff work days per year.

IFTA’s staff team also manages the IFTA Research Foundation.

IFTA currently pays about \$130,000 in association management fees.

## **DESIRED ATTRIBUTES/CHARACTERISTICS**

IFTA is seeking a group or individual with strong organizational skills capable of managing the day-to-day business affairs of the association with minimal supervision.

The successful candidate will ...

- be comfortable working with growers, research and extension personnel, and university staff.
- be willing to travel to all conferences and tours.
- have strong computer, book keeping and time management skills.
- have some background in the tree fruit industry.

The International Fruit Tree Association is now accepting proposals for the management and supervision of the organization. Reporting to the IFTA Board of Directors, this entity/individual would be responsible for all Association business and website management while coordinating publication of the Compact Fruit Tree journal (three times annually) and Annual Conference and Orchard Tours. The entity/individual will coordinate with the Education Director (appointed by the Board) to implement the educational programs and content publication. Applicants must specify if they will sub-contract any responsibilities such as legal, accounting, travel, logistics etc. in order to encompass all the requirements, the Board of Directors will have authority to approve sub-contractors for key association activities.

IFTA’s 2015 990 form of financial information is publicly available through this link.

<http://www.guidestar.org/FinDocuments/2015/386/154/2015-386154178-0d094eec-90.pdf>

## **CURRENT STAFFING FUNCTIONS**

- 1) Member Management
  - i) Maintain Membership Database and member services including billing, renewals, reminders, communications, dedicated IFTA phone line
- 2) Administration/Business Management
  - i) Provide an office for the Association including all necessary hardware, software, data security and backup etc.
  - ii) Financial management and administration, including accounts receivable and payable, monthly financial reporting, annual budgeting, all financial record keeping and reconciliation, tax returns
  - iii) Legal and financial compliance for a 501 (c) 5 non-profit Association
  - iv) Manage and improve donations to the Young Professionals scholarship fund
  - v) Improve brand awareness and maximize recognized use of IFTA content
  - vi) Maintain historic and business records as directed by Board
  - vii) Comply with current Board Policies, suggest additional policies as needed and draft new policies as directed by Board
- 3) Governance
  - i) Plan and support IFTA Board and Committee meetings as necessary. Regular meetings include:
    - (a) Board of Directors - monthly conference calls plus extended face to face meetings at events
    - (b) Committees - Education, Young Professional, Communications, Executive/Finance, Research, Women's Network, Nominating
    - (c) Conference and Study Tour Committees
    - (d) Other Committees and Tasks Forces as necessary
    - (e) Board and Committee Support
- 4) Annual Conference - February
  - i) Plan and Execute Annual Conference for about 450 members, 2 days of education sessions, 2 days of orchard tours, banquet, and special meetings (Young Professionals and Women's Network)
  - ii) Responsibilities include: advertising, registration, printed materials, speaker contracts, logistical coordination, hotels and transportation, staffing of meetings on site
- 5) Communications (Compact Fruit Tree and IFTA website)
  - i) Coordinate with Education Director to solicit material and publish Compact Fruit Tree 3 times per year. Articles derived from IFTA sponsored research and Annual Conference proceedings and affiliated research as provided
  - ii) Manage and update IFTA website and insure website connectivity to database
  - iii) Improve brand awareness and use of IFTA accredited content
- 6) Summer Orchard Tour – July
  - i) Plan and execute Tour of about 300 members, 3 days of regional orchard tours
  - ii) Responsibilities include: advertising, registration, printed materials, speaker contracts, logistical coordination, hotels and transportation, staffing of meetings on site
- 7) International Study Tour – every 2<sup>nd</sup> or 3<sup>rd</sup> year (replaces Annual Conference)
  - i) Plan and execute International Tour for up to about 250 members. (Tour for 2018 in New Zealand already contracted, two back to back tours of 10 days with joint Conference day in middle)
  - ii) Specifics on International Tours differ greatly from trip to trip and depend on significant professional or local support
  - iii) You will need to coordinate with our current Tour logistics company already under contract for the February 16<sup>th</sup> - March 5<sup>th</sup> 2018 New Zealand tour

- 8) Financial Management and Administration of IFTA Research Foundation 501 (c) 3.
  - a) Including basic financial and record keeping as outlined previously under Administration
  - b) Administer research grants including:
    - i. Coordinate Request for Proposals
    - ii. Compile RFP's and distribute to committee members
    - iii. Collect and distribute funds for approved projects
    - iv. Collect and publish research reports in Compact Fruit Tree, website
- 9) Manage and improve sponsorship of IFTA events
- 10) Other duties as required to manage the affairs of the association

#### **CURRENT ALLOCATION OF STAFF HOURS**

Function	# of Days	%
Annual Conference/Meetings	156.0	41.8%
Admin & Member Services	70.0	18.7%
Summer Tour	44.5	11.9%
Executive Leadership	39.5	10.6%
Publications	25.5	6.8%
Sponsorship	18.0	4.8%
Website/Social Media	15.0	4.0%
Research Foundation	5.0	1.3%
Total Days in Work Plan	373.5	100.0%

## **REQUIRED ELEMENTS OF PROPOSAL**

1. Table of contents and Executive Summary highlighting key points of proposal
2. Capabilities
  - Include relevant experience in managing/staffing small associations
  - Include relevant experience in managing/staffing agricultural associations
3. Qualifications of Professional Staff assigned to IFTA
  - Include relevant experience with or in horticulture and/or fruit trees
4. References
  - Provide contact information (name, phone number and email) for a minimum of three association and/or management references
5. Management Fees
  - Provide the estimated management fees (annual) you propose to implement the current management/staffing functions outlined in this proposal
  - The management fee should include a 30-day transition fee that would start about December 1, 2017
6. If you are an individual, outline how you plan to build a staff that can implement all of the management/staffing functions outlined in this proposal and the annual fees you estimate needed to provide these functions

## **DEADLINES & SCHEDULE**

1. The Request for Proposals will be issued on June 27.
2. Interested parties may submit questions (via email) from June 27 through July 9; answers for all questions will be provided to all interested parties on July 12.
3. Complete written proposals (in either Word or PDF format) should be emailed to Steve Drake, SCD Group at [steve@scdgroup.net](mailto:steve@scdgroup.net) and must be received no later than 5:00 pm (EDT), Monday, July 31, 2017.
4. Up to three (3) finalists will be invited to make face-to-face presentations to the IFTA selection committee in Chicago (O'Hare airport area) in late fall (mid-November to mid-December).
5. It is anticipated that the selected firm will assume full management on January 1, 2018, after an anticipated up to 30-day transition with the current management firm.