



The  
Lincoln Academy  
of Illinois

## THE LINCOLN ACADEMY OF ILLINOIS

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### REQUEST FOR PROPOSALS FOR ASSOCIATION MANAGEMENT SERVICES

The Lincoln Academy of Illinois is a 501 (c) 3 organization based in Springfield, Illinois that was founded in 1964 to bestow Illinois' highest honor – The Order of Lincoln at an annual formal convocation ceremony. The Academy is exploring a potential partnership with an Association Management Company (AMC) to serve the needs of our organization going forward as we anticipate the retirement of our dedicated long-time Executive Director.

Since its inception, the Order of Lincoln has been bestowed upon hundreds of individuals who have made tremendous contributions to the fields of business, the arts, sports, agriculture, humanities, and science. The Lincoln Academy partners with donors, trustees, academic trustees, regents, rectors, and the Governor of the State of Illinois as President to advance the values exhibited in the life of Abraham Lincoln through programs that encourage leadership by honoring distinguished Illinoisans' contributions to society; encouraging public service; and investing in developing principled leadership for future generations. As a part of our work, we host two annual convocations – one in the spring honoring outstanding Illinoisans and the other in the fall recognizing outstanding college students at each university throughout Illinois. We also seek to raise awareness of our work through a variety of mediums including our website; podcast series, various social media outlets; and broadcasting our annual convocations in partnership with public television. To learn more about the Lincoln Academy of Illinois, our mission, history, and organizational structure, please visit us at:

<https://thelincolnacademyofillinois.org/>

#### **Request for Proposal Timeline/Process:**

##### **Timeline:**

<b>Date/Deadline</b>	<b>Action Item</b>
August 10, 2021	Lincoln Academy distributes the call for proposals
September 10, 2021	Responses from interested AMCs due

##### **Submission Details:**

Please submit electronic RFP responses to Julie Kellner at:

[JKellner@TheLincolnAcademyofIllinois.org](mailto:JKellner@TheLincolnAcademyofIllinois.org)

##### **Contact Info:**

Please direct any questions regarding this RFP, the scope of services, or clarifying questions to:

Julie Kellner, Executive Director  
The Lincoln Academy of Illinois  
(217) 725-3125

## ASSOCIATION MANAGEMENT COMPANY RFP QUESTIONNAIRE

### **Company Information:**

Name:	
Address:	
Company Website:	
RFP Contact Information:	

Please provide a brief description of the following information related to your company:

- Description of your company:
- Number of company employees:
- Bios of key personnel, including assigned representative to Lincoln Academy account:
- Number of years you have been providing association management services

### **Scope of Services:**

In order to help respondents to this RFP, a “Summary of Work” document may be found in Attachment A. This document outlines the scope of services we hope to retain as part of our core contract, but also outlines services that are currently outsourced to a third-party provider but that we might entertain/consider bringing under the umbrella of services at a future point in time.

Indicate which **in-house** capabilities/services your company can offer. Please check all that apply and feel free to attach more detailed information on each service offering.

<b>Event Planning</b>	
<input type="checkbox"/>	On-site event planning management
<input type="checkbox"/>	Virtual event planning management
<input type="checkbox"/>	Event Marketing/Invitations
<input type="checkbox"/>	Event Registration
<input type="checkbox"/>	Regent and Trustee Meetings Management
<b>Marketing/Communications</b>	
<input type="checkbox"/>	Social Media Communication Management
<input type="checkbox"/>	Website Management
<input type="checkbox"/>	CRM Management/Tracking
<input type="checkbox"/>	Print Communication Management
<input type="checkbox"/>	Mass Email Communication Services
<b>Creative Services</b>	
<input type="checkbox"/>	Graphic Design
<input type="checkbox"/>	Copywriting/Proofreading
<b>Executive Support Services</b>	
<input type="checkbox"/>	Board Meeting Management
<input type="checkbox"/>	Strategic Planning

<b>Financial Management Services</b>	
	Bookkeeping
	Monthly bill payment services, revenue deposits and receipting
	Budgeting
	Audit preparation
	Financial reporting and tracking
	Annual Tax Filings
<b>Fundraising</b>	
	Grant writing
	Pledge invoicing and following up
	Gift receipting
	Data/Entry/Donor records and tracking
	Donor thank you notes
	Campaign reports/Other fundraising reports
	AG Filings
<b>Miscellaneous</b>	
	Physical/Off-Site Storage
	Virtual Records Management

*The Lincoln Academy may not choose to utilize all services in favor of keeping partnerships with existing third-party vendors.*

Please provide a list and description of any other services you offer that you believe may be of interest to The Lincoln Academy based on your understanding of our mission, priorities, and association needs as articulated in the Summary of Work document in Attachment A.

We recognize there are elements of the “Core Services” that an Association Management Company may not be able to provide for a variety of reasons that have historically been performed by our Executive Director. Please note if there are any “Core Services” outlined in the Summary of Work document in Attachment A that your company is not able to provide.

Indicate software expertise your company has in-house. Please check all that apply. If you have expertise in a software that is similar to one of those listed below, please list those alternative software options. \* *Indicate a product we currently use.*

<b>Communication/Volunteer Management</b>	
	Zoom Meetings and Webinar*
	Constant Contact
	Versai (Access based fundraising system)*
<b>Financial Management</b>	
	Quick Books*
	Pay Pal processing*
<b>Marketing/Creative Services</b>	
	Adobe InDesign
	Adobe Photoshop
	Website Management Software
<b>Core Software Expertise</b>	

	Box
	Microsoft Office (outlook, word, excel, powerpoint, etc)*

Please provide a list and description of any other software you have expertise with that you believe may be of interest to the Lincoln Academy of Illinois based on your understanding of our mission, priorities, and association needs.

As the work of the Academy grows, fundraising is an increasingly important scope of our work. Please explain if and how your company might support our work in this area.

**Experience, References, and Other:**

Would we be assigned a designated account representative that would be the primary contact and liaison to our Chancellor and Executive Leadership?

What experience do you have in working with organizations similar to the Lincoln Academy of Illinois? (Please explain)

Provide a list of association clients you are currently serving.

Please provide the name and contact information of 3 professional references (at least two must be current clients, with at least one being currently assigned to our designated account representative)

Given what you know about the Lincoln Academy of Illinois, how would you articulate your uniqueness and distinctiveness in terms of the added value you could bring to our work?

What additional important information would you like to share regarding your company and service offerings that you wish for us to consider?

**Financial/Contract Information:**

Provide your proposed fee structure, schedule and payment terms for the Scope of Services required. Please consult the Summary of Work document found in Attachment A. It would be helpful to receive an estimate of fees based on the following parameters:

- Fee for core services as provided on the Summary of Work document
- Additional add-on pricing for supplemental services we currently outsource to other providers. (note any cost savings that may be gained by adding those third party services to the core services proposal.)
- Indicate if any cost savings is derived from locking into a contract term beyond a standard 1-year contract term (i.e a 3-year or 5-year contract term).

Please attach a sample contract for our review.

*Thank you for your interest in and response to this request for proposal for services of the Lincoln Academy of Illinois.*



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**ATTACHMENT A: SUMMARY OF WORK**

<b>Core Services</b>	<b>Add-On Services (currently outsourced)</b>
<b>Board Governance &amp; Strategic Planning</b>	<b>Board Governance &amp; Strategic Planning</b>
Working closely with Chancellor on providing strategic counsel and engagement of membership related to strategic policy decisions, fundraising strategy, and increased visibility of the Academy. This included helping to develop and maintain a strong and committed Board of Regents, Trustees and Rectors.	
Facilitating and implementing work of the Executive Committee, Board of Regents, General Trustees, and Rectors. This includes facilitating the work of the Standing Committees; assisting the Committee Chairs (includes setting up online and in person meetings; sending notices; participating in all meetings/calls; creating agendas; preparing minutes as requested) serving as a member of the Membership and Communications Committee and as an ex-officio member of all other committees.	
Ensuring the currency and accurate implementation of the Bylaws	
Working with the Chancellor and Regents to manage the logistics of the Academy's strategic planning process and ensure its implementation; recommend and implement timelines and resource needs to ensure strategic goal achievement	
<b>Financial Management/Legal</b>	<b>Financial Management/Legal</b>
Work with Treasurer and Committee Chairs to draft annual budget	Audit/Financial Review
Financial oversight of approved budget – including maintaining and overseeing all bank accounts, working with bookkeeper and auditor. Also includes ensuring the sound financial condition of	Bookkeeping

the Academy to operate within the approved budget and insure net profitability of convocations and maximum resource utilization.	
Coordinate work with the Land of Lincoln Community Foundation to maintain policies and coordinate reporting and distribution of funds for annual student stipends/awards. This includes working in partnership with the Academy and Community Foundation for the Land of Lincoln to help provide oversight for the wise allocation of endowment resources.	Tax Preparation and annual filings
Assisting in the expansion of resources, working with the Regents, and all members and friends of the Academy in securing resources.	Endowment Management and Administration
	Legal (as needed)
<b>Communications</b>	<b>Communications</b>
Serve as key spokesperson for academy's constituents, the media, colleges and universities, past laureates, student laureates, Governor's Office, strategic partnerships and general public.	Speech writing
Deepens and refines all aspects of Academy communications strategically – and helps oversee the implementation of this with the management company. Designs communication efforts and coordinates marketing strategies; oversees updates and enhances quality of the Academy website and all social media platforms.	Website design and maintenance
Exploring, establishing, and sustaining present and new institutional relationships - partnerships and alliances - with other Lincoln - focused organizations throughout Illinois and using these relationship opportunities to strategically advance the Academy's mission, visibility, and relevance throughout Illinois. This includes appropriately thanking and recognizing donors in an appropriate manner.	Social media management
Oversees development and management of Academy's web presence ensuring member profiles and event calendars are continuously updated	Printing Services
Oversees development and management of internet-related information sites, including Wikipedia pages	Mailing Services
	Graphic Arts/Design Services (as needed)

<b>Organizational Operations</b>	<b>Organizational Operations</b>
Regularly evaluating success of Academy programs and initiatives	
Reviewing, approving and signing all contracts /notes/agreements and other instruments for services for office operations; and all Lincoln Laureate Convocations and Student Laureate ceremonies	
Ensuring an accurate and up-to-date master mailing list	
Supervising external contract vendors: financial; audit; social media; speech writer	
Developing systems, processes and structures to ensure efficient and effective operations that guarantee historical integrity and the security of sensitive data	
<b>Event Management</b>	<b>Event Management</b>
Working with the Chancellor to identify future Lincoln Laureate Convocation sites and Civic Committee Chairs	Engages event management company/consultants from time-to-time as needed
Assisting Civic Committee in inviting sponsorships and encouraging event attendance	
Segmenting the master mailing list so formal invitations are sent to appropriate households and working with Civic Committee to add names to the list	
Working with the governor's office to secure participation in Laureate and Student Laureate Convocations	
Working with a mailing service to send formal invitations in a tasteful and timely manner	
Prepare and frame all Laureates' citations	
Order all medallions and other laureate supplies	
Coordinating all vendors, event sites, and other aspects of planning the Laureate Convocation ceremony and all events surrounding the ceremony and the Student Laureate Convocation ceremony and all events surrounding the ceremony	
Distributing copies of all printed materials to the State Archives and Abraham Lincoln Presidential Library	