

**Request for Proposals (RFP)**  
**American Society of Preventive Oncology (ASPO)**  
**November 21, 2019**

**I. General**

Objective

ASPO seeks a three-year contract with an accomplished association management company/other entity (subsequently referred to as the contractor) to assume administrative responsibilities for the organization and provide technical support for its growth.

Key Dates

January 3 2020: Deadline for Proposals

Jan 20-31: Videoconference interviews and negotiations with finalists

Feb 28: Contract Award

**II. Background**

The American Society of Preventive Oncology (ASPO) is a multi-disciplinary society committed to accelerating progress toward cancer prevention and control. Its mission is to foster the continuing development of investigators and other professionals involved in cancer prevention and control and the exchange and translation of scientific information to reduce cancer burden.

ASPO was incorporated in the state of New York on December 28, 1977 after a one-year planning period. The initial Board of Directors included 9 individuals from the U. S. National Cancer Institute, Northwestern University, the New York State Department of Health, the National Cancer Institute of Canada, Roswell Park Memorial Institute, the University of California San Francisco, Memorial Sloan-Kettering Cancer Center, and the University of Rochester. These initial members identified a need for a multidisciplinary organization focused on cancer prevention and control. ASPO currently has about 450 individual members.

ASPO is governed by an elected Executive committee that meets to transact business four to six times per year by conference call and once a year in person at the annual meeting (for more information, see the ASPO bylaws). Administrative functions are currently carried out by staff at the University of Wisconsin under an agreement provided by ASPO. Programmatic activities are carried out by volunteers, e.g., Executive Committee members, Special Interest Group chairs, and committees. ASPO receives funding largely from contributions, membership dues, meeting registrations, NCI conference grant, and sponsorships for meeting activities. For 2019-2020 (12 month fiscal year), projected revenues and assets are \$459,000 and projected expenses are \$315,000.

Currently, ASPO activities include organizing an annual conference (attended by approximately 350 individuals), maintaining its website ([www.aspo.org](http://www.aspo.org)), maintaining and distributing announcements for cancer prevention scientists, engaging in social media activities, providing webinars, and providing mentoring opportunities at annual meetings. The Executive Committee wishes to continue these activities.

Through this RFP, ASPO seeks proposals for support in managing its financial and administrative workload and in expanding its membership and financial base. The successful contractor will report to the Executive Committee. The Executive Committee will provide support, guidance, and institutional memory for ASPO activities (including all committees).

### **III. Statement of Work**

This document provides detailed specifications for services sought. The schedule for transferring specific responsibilities to the successful contractor will be negotiated based on several factors, including operational logics, cost, and continuity of ASPO activities. Comments on timing are provided where applicable in the list of services below.

#### General notes:

Entities responding to this RFP should propose plans for developing and sustaining an effective working relationship and ongoing communications with the ASPO president and Executive Committee. Plans for providing the Executive Committee ongoing access to information about ASPO finances and membership should also be described.

The ASPO website contains information about the organization, its committees, membership options, and activities. Entities responding to this RFP are assumed to have a thorough understanding of any information on the website relevant to the RFP Scope of Work. Any proposed changes to ASPO practices or procedures beyond those described in the RFP must be clearly identified.

ASPO intends to retain its custom website, which is being upgraded to include a new conference page. Current costs of the website include \$2000/year for website support; \$800/year for 3G virtual Private server hosting; and annual multi domain costs of \$155/year. Our current contact at Mod9Multimedia in Madison, Wisconsin, is Austin Lacey. Mr. Lacey designed the website, created the registration and membership database, and the on-line abstract submission system that ASPO has been using for several years. The website also includes on-line reviewer access. ASPO is open to new arrangements for website hosting and management but encourages entities responding to this RFP to weigh costs and benefits to ASPO.

#### **1. Administrative Tasks**

- a. Manage day-to-day communication between the Executive Committee, members, and representatives from other organizations, etc.
- b. Manage member database, surveys, reports, and elections.
- c. Provide a central mailing address for ASPO business and distribute incoming mail.
- d. Provide a telephone line for ASPO business; forward calls as appropriate.
- e. Maintain ASPO records according to procedure.
- f. Prepare documents for Executive Committee meetings/conference calls; serve as *ex officio* member of the Executive Committee.
- g. Manage and participate in all Executive Committee meetings, correspondence, and reports.
- h. Prepare and distribute minutes obtained from Executive Committee conference calls and meetings.

- i. Schedule Executive Committee conference calls.
- j. Coordinate with Secretary/Treasurer to help promote and execute webinars with various Special Interest Groups.
- k. Provide assistance to the president, nominating committee, and Special Interest Group chairs in locating, selecting, and appointing new committee members, committee chairs, and committee liaisons, including sending appointment letters and thank you letters to retiring members.
- l. Preparing and communicating to ASPO members and other interested parties Calls for Abstracts and Calls for Awards Nominations.
- m. Ensuring the currency of information on the ASPO website and provide updates, and oversee social media (Facebook and Twitter accounts).
- n. Overseeing and providing support for the ASPO annual election, including communication with nominating committee, nominees, voting members, and preparing post-election analysis.
- o. Maintaining the ASPO listserv and distributing announcements and information via email through the listserv.
- p. Maintaining and updating the organization's strategic plan.
- q. Administration of all ASPO awards.
- r. Communicating to *Cancer Epidemiology, Biomarkers, and Prevention* journal publisher (American Association for Cancer Research) member eligibility for receiving journal, based on their annual membership renewal status (ongoing process).
- s. Coordinate posting appropriate content to the ASPO Facebook page and Twitter feed.

## **2. Accounting**

- a. Manage fiscal affairs of ASPO according to fiscal policy, including check deposits and disbursements, bank signatures, maintaining full and accurate financial records and reports.
- b. Prepare information for IRS Form 990 submission and identify potential firms for tax preparation services as requested. ASPO currently retains the services of an accountant in Madison, Wisconsin to create and submit tax forms each year for tax compliance as a non-profit entity.
- c. Ensure ASPO is audit-ready; identify potential firms for audits and/or financial reviews for Executive Committee consideration when necessary.
- d. Reconcile ASPO accounts (including investments) and provide financial statements to the president and secretary/treasurer, on quarterly basis.
- e. Manage banking transactions, including deposits, writing checks, processing cash advances and reimbursements, maintaining ASPO debit card.
- f. Assisting secretary/treasurer in drafting and recommending annual budget.

## **3. Annual meeting and preconference workshops**

### Pre-meeting

- a. Negotiate site selection and hotel contracts, including audiovisual support for the meeting.
- b. Make recommendations and handle all site visits regarding meeting location.
- c. Make recommendations for the development and production of the registration materials (brochures, registration forms, flyers) etc.

- d. Make recommendations for the development and production of funding-request letters and materials (brochures/flyers).
- e. Proof-read and make recommendations on the production of final program text and registration forms.
- f. Development and review of meeting specifics, customized meeting specs sheets and banquet event order forms from the host site.
- g. Selection, negotiation, and management of menus for meeting, including daily coffee breaks, poster receptions, and meals.
- h. Order meeting supplies, signs, plaques, etc.
- i. Schedule conference calls of the program committee and coordinate communications for the committee.
- j. Coordinating advertisement for the meeting with *Cancer Epidemiology, Biomarkers, and Prevention* journal publisher (American Association for Cancer Research), Schools of Public Health, Cancer Centers, etc.
- k. Process all meeting registrations through an online ASPO registration database.
- l. Coordinate exhibit hall and table-top exhibitor arrangements.
- m. Coordinate meeting set-up arrangements pertaining to food and beverage set-up, and poster presentations.
- n. Coordinate and send speaker invitation letters.
- o. Coordinate materials pertaining to speakers' presentations (i.e. slide presentations, handouts, and other audio/visual presentation needs).
- p. Facilitate the preparation and submission of an annual conference grant to the National Institutes of Health.

#### On-Site Meeting

- a. Manage all aspects of the conference on-site.
- b. Provide additional staff members to ensure success of conference and its associated elements.
- c. Coordinate poster board setup.
- d. Work with audio visual provider to organize all AV needs.
- e. Coordinate lunches, social hours, speakers and award presentations.
- f. Assist with coordination of poster judging and awards.
- g. Order plaques/awards, arrange for photography.

#### Post-Meeting

- a. Coordinate post-meeting evaluation survey and compile results report for review by the Program Committee and Executive Committee.
- b. Review all bills post-meeting to ensure accuracy.
- c. Handle all reimbursements to speakers, travel award winners, honoraria, etc.
- d. Send speaker appreciation speaker letters.

#### **4. Member Services**

- a. Answer member questions and calls within 24 hours of receipt using customer service best practices.
- b. Return phone calls and emails within 24 hours of receipt; provide "away" messages when out of the office to keep members updated on when they might expect a return call or email.

- c. Track and report the nature and number of calls and emails received and outcome or issue resolution on a monthly basis.
- d. Provide updated membership reports to the Executive Committee and President as requested.
- e. Send out membership reminders and manage dues collection.

## **5. Record Keeping**

- a. Maintain Executive Committee proceedings and other records on file per policy.
- b. Maintain updated Bylaws, Strategic Plan, and other important documentation as per policy and procedure.

## **6. Knowledge management**

- a. The contractor will ensure that the president sufficiently involves Executive Committee in calls related to governance, finance, decision making, situational assessment, and other leadership activities in order to create an effective management environment that encompasses sufficient redundancy and cross-training to ensure Client's needs are fully addressed under this agreement.
- b. The contractor will be responsible for the transfer and expansion of an ASPO document repository to a non-proprietary hosted file storage platform selected and funded by ASPO. These ASPO documents will include both digital and paper versions of archived documents will be housed and maintained by the contractor. Access to this repository shall be maintained jointly by staff and volunteer leaders to ensure access to information.
- c. It will be contractually noted that ASPO owns all archival materials related to the business of ASPO, whether these are generated by ASPO or the contractor. Any of these materials will be made available to the Executive Committee upon request, and at the end of each contract year the contractor will deliver to the Executive Committee up-to-date digital copies of all archival materials including, but not limited to, the membership database, financial records, meeting minutes, conference materials, and historical documents. These will be delivered according to a procedure and medium mutually agreed upon by the contractor and the Executive Committee.
- d. In coordination with the ASPO president, Executive Committee, and other thought leaders, contractor shall assemble a manual of operations that captures functions and knowledge essential for the day-to-day operations of ASPO.

## **IV. Instructions for Offerors**

Proposals in response to this RFP should be sent **via email** to Dr. Karen Basen-Engquist (kbasenen@mdanderson.org) by 5 pm CST January 6, 2020, copying Julie McGregor (jmcgregor@wisc.edu). Entities with possible interest in responding to this RFP may contact Dr. Basen-Engquist at any time with questions.

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Bidders should assume that ASPO has 430 members at the beginning of 2019 and continues to enroll members throughout the period of performance with a fairly steady membership.

Proposals should provide:

- Background, organizational structure, and capabilities of your organization. Cite experience with supporting and growing small to medium-sized associations.
- A description of how Management Firm will provide each of the services described.
- A proposed timeline for initiating and conducting work related to each service.
- Staffing plan for the services to be provided, including effort levels for each staff person. Include at least one person identified as key personnel. CVs for key personnel must be provided, and any change in key personnel requires ASPO approval.
- Costs for each category of service listed for each of the three contract years.
- A budget narrative explaining cost proposals.
- References (preferably other small-to-medium size associations you have served).

#### **V. Evaluation Criteria**

Proposals will be reviewed by members of an ASPO *ad hoc* committee; the Executive Committee will provide final approval for the selected bidder.

- Capabilities and experience of the bidders relevant to the RFP.
- Understanding of the RFP.
- Demonstrated expertise in association management and development/growth, based on proposal narrative.
- Adequacy of staffing plan.
- Cost.