

**Illinois Environmental Health Association
Office Management Services
Request for Proposal**

I. Statement of Objective

The Illinois Environmental Health Association (hereinafter "IEHA") is seeking a Contractor (hereinafter "Contractor") to perform Office Management Services as described in this Request for Proposal (RFP). IEHA is a state-wide, not-for-profit organization of professionals formed in 1950 with a current membership of 400. Membership consists of administrators, environmental health practitioners, sanitarians and technicians employed by governmental agencies, education and health care institutions and industry. IEHA's aim is to promote the highest degree of skill, efficiency and professional competence among sanitarians and others practicing in the various environmental health disciplines through the mutual exchange of knowledge and experience.

II. Contractor Qualifications and Description of Duties

IEHA is seeking a contractor to complete administrative/office management tasks for IEHA, such as maintaining the IEHA website, managing membership renewal and the membership database, publishing the IEHA quarterly newsletter, maintaining the Environmental Health Practitioner Continuing Education sponsor license, assisting with IEHA conferences/trainings, and responding to inquiries received from both inside and outside the organization. Minimum contractor qualifications:

- A. Experience in working with Microsoft Office products
- B. Driver's license and ability to travel to meetings and IEHA events
- C. Excellent customer service
- D. Ability to develop social media
- E. Contractor shall be bonded and insured
- F. Produce and maintain a modernized website

III Contractor Deliverables/Scope of Services

A. IEHA Office Responsibilities:

1) IEHA website and social media:

- a. The contractor shall maintain the IEHA website and social media accounts, updating upon request. The IEHA website includes content on current news, the IEHA calendar, conference registration, boards and committees, chapters, membership, credentials, IEHA News, Awards, a Career Center, sponsors and IEHA documents.

- b. IEHA is responsible for paying the monthly website hosting fees associated with maintaining the IEHA website (outside of the scope of the contractor agreement).
- c. The contractor will work with the IEHA board or an appointed representative of the board to determine the optimal hosting service and web layout.
- d. The board may direct the contractor to modernize the website on an as needed basis.

B. Telephone/Fax/Voice Mail: The contractor will maintain an IEHA dedicated telephone/fax line at the contractor's office at the contractor's expense. The contractor will check voice mail and faxes at least once every business day and respond to messages and phone calls within one (1) business day.

C. E-mail: The contractor will maintain an IEHA e-mail address at the contractor's expense. The contractor will check and respond to emails at least once every business day. The contractor is responsible for all fees associated with internet access from the contractor's office.

D. US Mail: The contractor shall maintain a USPS mailing address for the organization. The mailing address may be a US Post Office Box. If the contractor chooses to maintain a PO Box, IEHA will reimburse the Contractor for the costs of the PO Box. The Contractor shall check the mail at least once weekly, except for the one-week period prior to and leading up to IEHA scheduled trainings or conferences, where the mailbox shall be checked a minimum of once every other day. Any time-sensitive mail that requires the response of an IEHA Board member shall be scanned and emailed to the pertinent IEHA Board member within two days of receipt. Hard copies of mail that requires the response of an IEHA Board member shall be forwarded to the pertinent IEHA Board member within one week.

E. IEHA records: IEHA Board members are responsible for delivering electronic records of IEHA Board meeting agendas, Board meeting minutes, conference agendas, co-sponsor requests and budget documents to the Contractor. The Contractor is responsible for storing the electronic documents in an organized format that is available to the IEHA Board upon request. The Contractor is responsible for maintaining Board election results and an electronic list of membership contact information including renewal dates.

F. Confidentiality: The contractor shall maintain strict confidentiality of all IEHA data, records and other information and shall only use them for purposes as approved and specified by the IEHA Board of Directors and in accordance with Board policy.

G. Membership: The contractor shall manage all aspects of IEHA membership including:

1) Membership database: The contractor shall maintain a database of membership information, including member contact information and member membership renewal dates. The contractor is responsible for maintaining continuing educational documents for each member earned from IEHA facilitated events, trainings, workshops and conferences.

2) Membership renewal:

a) The contractor shall email out a [Membership Renewal Application Form](#) to all active and past members with active email addresses between November 15th and November 31st annually.

b) "Past Members" is defined as any member that has held an active membership within the last 24 calendar months but are not currently active members. Members without an active email address shall be sent a renewal application via mail.

c) The contractor shall email out a second renewal document to all active and past members that have not yet renewed their membership for that current calendar year between January 15th and January 31st annually.

d) IEHA will reimburse the Contractor for postage associated with all paper mailed renewal applications. The Contractor shall submit to the IEHA Treasurer a receipt of payment for postage associated with paper mailed renewal reminders.

e) The contractor shall receive and process membership renewal applications and collect payments, update the membership database and email membership certificates to those who renewed.

3) The contractor shall deposit membership payments to the IEHA bank account.

4) The contractor shall submit to the IEHA Treasurer on a monthly basis an itemized report of membership payments deposited into the IEHA bank account and received electronically through online payments.

H. Member continuing education report: Upon request, the contractor shall email and/or mail a Continuing Education Units report or a copy of the member's CEU report from past educational events.

I. Conferences and Trainings: The IEHA offers the following trainings and/or conferences annually:

- i. State-wide Annual Educational Conference
- ii. North Chapter Educational Conference
- iii. South Chapter Educational Conference
- iv. Central Chapter Educational Conference

v. Emerging issues conferences or webinars

- 1) The contractor will be responsible for the following for each training/conference:
 - a) The chairperson responsible for each conference will provide the contractor with detailed information regarding each conference, including, but not limited to conference location, dates, times, conference schedule and speaker information. The contractor will use the information provided to create the conference registration packet.
 - b) The contractor is responsible for posting the conference registration packet on the IEHA website and social media accounts.
 - c) Upon request of the conference chair or IEHA Board, the contractor is responsible for emailing the conference registration packet to IEHA members
 - d) Collecting paper conference registrations and payments and managing conference registrations and payments made through the IEHA website.
 - e) Depositing payments into the IEHA bank account
 - f) Coordinating with the IEHA Treasurer on any requested refunds or other payment discrepancies.
 - g) Publishing conference/training brochure/syllabus and emailing the documents electronically to the conference chairperson prior to the conference/training. The conference chairperson is responsible for providing all the information necessary for the Contractor to publish the conference's training brochure/syllabus. The conference chairperson is responsible for printing sufficient quantities of the conference brochure/syllabus prior to the day of the conference.

Publishing conference certificates of attendance and emailing them to the conference chairperson prior to the first date of the conference. The conference chairperson is responsible for printing the conference certificates and having sufficient blank conference certificates to accommodate walk-in registrants.

J. Maintaining IEHA's CEU provider license: The contractor is responsible for renewing IEHA's Illinois Department of Professional and Financial Regulations CEU provider license.

K. Managing "Co-sponsor requests": IEHA receives an occasional request to co-sponsor other professional organization's events. The IEHA Board is responsible for reviewing Co-Sponsor Requests. If a Co-Sponsor request is received by the Contractor, the Contractor shall forward the request to the IEHA President and IEHA Secretary for IEHA Board review and approval/disapproval

L. Annual Board of Directors Election: The contractor shall produce election materials that will include a ballot and biographical sketches for each candidate and arrange for them to be distributed to the membership via email at the time specified by the IEHA By-laws for the IEHA's annual election. The IEHA President with approval from the IEHA Board is

responsible for submitting to the Contractor all ballot information necessary to produce election materials including the IEHA members/candidates included on the ballot and the candidates' individual biographical sketches. Completed election ballots shall be submitted by members to the IEHA office (Contractor's Office). The Contractor shall collect the submitted ballots and transmit them to the IEHA's Teller's Committee after the election ends for tallying of the votes.

M. IEHA Newsletter ("IEHA Cardinal"): The IEHA Publication Chair is responsible for providing the Contractor with the material for the quarterly [IEHA Cardinal](#) (*March, June 1, September, and November*).

1) The Contractor is responsible for using the submitted material to publish a quarterly newsletter. The final version of the newsletter shall be reviewed and approved by the Publications Chair and the Contractor shall then distribute the quarterly newsletter to all active members via email and post the newsletter to the IEHA website during the following calendar dates:

- a. Quarterly Newsletter #1: Between March 1 – March 15
- b. Quarterly Newsletter #2: Between June 1 – June 15
- c. Quarterly Newsletter #3: Sept 1 – September 15
- d. Quarterly Newsletter #4: Nov 15 - Dec 1 (*Coincides with membership renewal*)

2) Members without an email address shall receive a paper copy of the IEHA Newsletter. IEHA will reimburse the Contractor for the cost of postage, printing and paper associated with the paper newsletters distributed to members. The Contractor is responsible for itemizing costs and submitting an invoice to the IEHA Treasurer.

N. Collection and tracking of payments/revenue: The Contractor is responsible for managing all forms of payments and revenue received including membership payments, conference and IEHA Cardinal sponsor/exhibitor payments and payments for IEHA conferences/trainings.

1) IEHA bank deposits shall be made as necessary, but no less than once per week. The contractor shall submit a monthly itemized report to the IEHA Treasurer for all deposits made and all electronic payments received each month. The report shall include

- a) a copy of the deposit receipts,
- b) 2)a spreadsheet identifying the name of payee,
- c) 3)the amount of payment, the budget line item(s) that is (are) to be credited,
- d) 4)the total amount to be credited to each budget line item, and
- e) 5) line-item totals for the calendar year thus far.

2) IEHA Merchant Services Account: The Contractor is responsible for ensuring the merchant service account portal is functioning on the IEHA's website. The IEHA Treasurer is responsible for setting up the IEHA merchant services account.

O. Board of Directors Meetings: The IEHA Board of Directors meets four (4) times annually.

1) The contractor shall submit a Contractor report to the IEHA President and Secretary at least 5 business days prior to the scheduled meeting. The report shall include the following information:

- a. Current membership numbers
- b. Office issues/updates
- c. Contractual matters
- d. Updates on conference planning
- e. The contractor will be expected to maintain digital and physical files which are IEHA records and archives. This may include up to two dozen banker boxes.

2) Upon request, the Contractor shall attend IEHA Board of Directors meetings.

P. Travel: For travel pre-approved by the IEHA Board of Directors, the contractor shall be reimbursed according to the travel reimbursement schedule below under *IV Contract Terms (C), Payment to Contractor (4) Travel*.

IV Contract Terms

- A. Term - The contract term will be a 2-year period beginning on July 1, 2022, and ending on June 30, 2024, unless terminated earlier by the Contractor or by IEHA.
- B. Payment: IEHA shall pay the contractor a monthly payment of \$2,000/month for a total payment of \$24,000 per year. Payment will be made within 30 days of the first of each month for the prior month's services.
- C. Transition periods- During any transition between offices, the new contractor will receive one half of the contract term monthly payment. This transition period will start two months prior to the terms of the contract.
- D. The contractor will be an independent contractor and shall use their own resources and office equipment to complete the tasks and projects identified in this contract, with the exemption of any reimbursements clearly identified within this RFP. Office supplies: IEHA will reimburse the Contractor for office supplies including paper and printer ink required for printing ballots and for the postage associated with mailing the ballots to IEHA membership. The contractor must submit an itemized report describing the office supplies or postage purchased, the costs associated with the purchase, and provide receipts to the IEHA Treasurer for reimbursement.

- E. Termination: If the Contractor fails to perform the services specified in the final executed agreement/contract, IEHA has the discretion with 30 days' notice to terminate the agreement/contract. If IEHA fails to perform the services specified in the final executed agreement/contract, the Contractor has the discretion with 30 days' notice to terminate the agreement/contract. IEHA will pay the contractor all approved portions of invoices up to the date of termination. If the agreement ends, the Contractor shall provide IEHA with all membership records (electronic or paper) and all other associated IEHA records within 14 days of contract termination.
- F. Governing Law - This contract will be governed by the laws of the State of Illinois.
- G. Final Form of Agreement - The IEHA Management Services agreement with the selected contractor must be approved by the IEHA Board of Directors and signed by the IEHA President.

V PROPOSAL PROCESS

A) **Final Form of Agreement** - The IEHA Office Management Services agreement with the selected contractor must be approved by the IEHA Board of Directors and signed by the IEHA President.

B) **Request for Proposal Format** - The contractor shall submit at minimum the following information/documents:

1. Resume of Contractor
2. Statement of Interest
3. Three Professional References

C) **Submittal of Proposal:**

1. Due date for proposal submittal is February 25, 2022, at 5:00 pm
2. Transition start date 5/2/2022
3. Contract start date 7/1/2022
4. Contract end date 6/30/2024

Proposals shall be delivered to:

Lenore Killam

University of Illinois Springfield

One University Plaza MS PAC 440

Springfield IL 62703

Or emailed to: lkil2@uis.