



Business and  
Professional  
Women/FL

**Florida Federation of Business & Professional Women's Clubs Inc. (BPW/FL)  
REQUEST FOR PROPOSALS  
BUSINESS MANAGER SERVICES**

**BACKGROUND INFORMATION:**

The Florida Federation of Business & Professional Women's Clubs, Inc. (BPW/FL) is a 501(c) 6 organization that empowers women through advocacy, education and information. BPW/FL is seeking proposals from qualified vendors for the contracted position of state business manager.

The services and intellectual knowledge include, but are not limited to, the following:

1. Receive, process and record all monies for membership dues and conference registrations, including credit card processing, and report to the treasurer and conference chair in a timely manner utilizing the current financial software.
2. Receive, process and record, within seven (7) business days of receipt, all membership information received from the LOs, utilizing the current software.
3. Record all deposits made in BPW/FL bank accounts, utilizing current financial software.
4. Invoice members for their annual renewal upon request of the LO using the CRM system.
5. Process and pay all approved invoices and expenses vouchers for signature by the BPW/FL Treasurer.
6. Notify members by email of their lapsing membership using the CRM system.
7. Maintain and update a membership database of all BPW/FL members using the CRM system and Airtable.
8. Respond to member inquiries on a timely basis using the BPW/FL Gmail account.
9. Collect and report to the Executive Committee (EC) the contact information of all state officers, committee chairs and Local Organization (LO) presidents immediately after their election or appointment.
10. Collect and report to the EC the contact information of all LO officers and standing committee chairs.
11. Receive and review initial documentation of newly chartering LOs.
12. Furnish the Credentials Chair/State President with the final membership status of all attendees at state meetings.
13. Manage office supplies, including BPW/FL stationery and business cards.
14. Maintain a permanent file of all records as required.
15. Review, archive and purge files in the state business office with the BPW/FL Secretary on even-numbered years.
16. Obtain a bond in accordance with the BPW/FL Bylaws, the bond amount to be set by the EC.
17. Attend all BPW/FL EC and state meetings, including but not limited to, Annual State Conference, fall membership meeting, and planning meeting.
18. Communicate and report membership information on a monthly basis to LO presidents, treasurers and membership chairs utilizing the CRM system.

19. Communicate and report registration information to conference/event chairs utilizing the BPW/FL website and CRM system.
20. Prepare and validate mailing labels for *Florida Business Woman* (three times per year).
21. Post BPW/FL financial statements and BPW/FL membership, Board of Directors, and EC meeting minutes to the BPW/FL GSuite account.
22. Knowledge of QuickBooks online (preference).
23. Knowledge of Airtable and ActiveCampaign (the current CRM system).
24. Produce monthly deposit and Stripe reports that tie to membership numbers report.
25. Produce and report on a monthly basis all outstanding receivables and payables.
26. Maintain and store all fiscal records.
27. Serve as an ex-officio member of the Budget Committee.

Because of the nature of the position and the character of BPW/FL work, the state business manager is expected to give a high quality of service to BPW/FL, requiring considerable independence of judgment and creative thinking. BPW/FL recognizes that the principle of the forty-hour (40) work week has been fairly well established in business and industry, but feels that it is neither feasible nor realistic, in respect to this position.

This position shall be considered contract, part-time, and it is anticipated this work will require no more than an average of 20 hours per month.

#### **PROPOSAL SUBMISSION AND DEADLINES:**

Proposals must include:

- BPW membership status, length of membership and offices held (if applicable/not a requirement)
- Current resume including detailed experience in field of organizing and managing business affairs in career
- List of three references with contact information
- Narrative of approach to the position per the job description listed above including, but not limited to:
  - Organization techniques
  - Time management techniques
  - Communication techniques
- Justification for annual fee

Candidates agree to answer questions and/or provide clarifications as may be asked by the BPW/FL Request for Proposals Committee and/or the Executive Committee.

Proposals are for approximately a two-year contract period from start date (anticipated to be 6/1/19 through 8/31/21).

**Proposals are to be postmarked or emailed no later than March 8, 2019.**

Proposals can be printed and submitted by mail or submitted electronically via email as a PDF or WORD file attachment to:

Jerri Evans, President  
BPW/FL  
3254 23<sup>rd</sup> Street North  
St. Petersburg, FL 33713  
jerri0679@gmail.com

Questions or clarifications on the position can be directed to BPW/FL President, Jerri Evans, at the above email address.

BPW/FL reserves the right to not consider proposals that are deemed not responsive to the criteria outlined in this Request for Proposals.