



CALIFORNIA ACADEMY
OF NUTRITION & DIETETICS

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Academy of Nutrition and Dietetics

California Academy of Nutrition and Dietetics

Request for Proposal (RFP) for Association
Management Services

**Submission Deadline: Friday, March 1, 2024 at 5:00
pm Pacific Standard Time (PST)**



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I. Introduction

A. Purpose

The California Academy of Nutrition and Dietetics (California Academy) is issuing a Request for Proposal (RFP) to solicit bids from qualified third-party association management companies to provide effective management and day-to-day operational support for the California Academy, a state affiliate of the national dietetic organization, Academy of Nutrition and Dietetics (Academy). The term of the contract will be from June 1, 2024 to May 31, 2025 and is renewable yearly upon agreement by both parties.

The tentative schedule (subject to change) for the RFP is:

Due date for questions	February 9, 2024
Due date for RFP	March 1, 2024
Finalists to be notified	April 15, 2024
Interview with finalists (if needed)	May 1, 2024 – May 8, 2024
Notification of selection	May 15, 2024
Contract execution	June 1, 2024 pending contract

B. Background

California Academy is a non-profit 501c (6) membership association of nearly 5,000 Registered Dietitian Nutritionists (RDNs), Nutrition Dietetic Technicians Registered (NDTRs), and students who are committed to improving California’s health and advancing the profession of dietetics through research, education, and advocacy. In FY 22-23, there were 5,796 California Academy members, of which 68% are classified as “Active” members (e.g., RDNs or NDTRs) and 23% classified as “Students” (e.g., dietetic interns, undergraduate, or graduate).

California Academy’s vision and mission statement are as follows:

- **Vision** – Optimize California’s health through food, nutrition, cultural understanding, and health equity.
- **Mission** – Empower California dietetics professionals to be science and evidenced-based food and nutrition experts, who demonstrate inclusivity in leadership and practice.

The goals of California Academy include:

- Increase membership and retention of members.
- Increase transparency of California Academy operations.
- Provide member networking opportunities and continuing education.
- Advocate for policies and regulations that support the advancement of RDNs and improve the health of Californians.
- Recognize and support future dietetic leaders.



C. Organizational Structure

California Academy is governed by an Executive Board, who are a group of volunteers, elected by members. Most Executive Board members chair a committee or council.

Due to its vast size, California Academy is divided into eight districts and two regions. Districts and regions function as local chapters and provide resources, events, and other membership benefits that are unique to their respected areas. Districts are separate legal entities and are registered as 503(c) 6 corporations; they have their own executive boards consisting of members who have been either appointed or elected through a voting election process. In contrast, regions are not separate entities and considered an extension of California Academy and are governed by a committee of members in which no election takes place.

D. California Academy Foundation

The California Academy of Nutrition and Dietetics Foundation (California Academy Foundation) is the philanthropic arm of California Academy. The Foundation's mission is to optimize the health and nutrition of the public by supporting community outreach, quality dietetics education, research, and practice. The Foundation Chair sits as a non-voting member on the California Academy Executive Board.

II. **Scope of Services**

The selected management company will be responsible for providing overall administrative and management oversight to ensure effective operations of California Academy. The scope of services the management company will provide include, but are not limited to:

A. Executive Leadership

- Reviews California Academy's Bylaws and Policy and Procedures and collaborates with the President and the Executive Board (EB) to ensure policies are abided by. Makes recommendations to the President/EB to revise and update policies as needed.
- Collaborates with the President to review, maintain, and update goals and objectives described in the Strategic or Action Plan.
- Assists in creating and maintaining Guiding Principles document that aggregates best practices, lessons learned, and recommendations for delivering California Academy and California Academy Foundation services to members.
- Assists the President in collecting and preparing documentation from EB for the quarterly or yearly progress reports.
- Assists the President in compiling information for the annual Business meeting during the annual conference.



- Conducts an analysis of membership enrollment/retention quarterly; collaborates with EB to devise strategies that increase membership.
- Establishes a system to organize and streamline California Academy and California Academy Foundation documents and reports.

B. Financial Management

- Reviews and analyzes the annual budget with the Treasurer on an as needed basis.
- Ensures that Accounts Receivable/Payables distribution of funds in cooperation with the CA Academy Secretary/Treasurer and California Academy Foundation Treasurer.
- Manages and communicates budget performance to EB by utilizing technology/software (e.g., QuickBooks Online).
- Serves as the liaison to the accountant.
- Submits annual tax forms as prepared by a vendor/CPA in accordance with California State Tax laws.
- Submits and updates documentation annually and/or as needed basis to maintain California Academy, California Academy Foundation, and districts non-profit status.
- Collaborates with the President and Treasurer to negotiate rates for specified contract staff (e.g., lobbyist).

C. Administrative

- Attends in-person meetings and events as requested by the Executive Board, including annual conference.
- Collects agenda and consent items for monthly EB meetings and collaborates with the President in developing agenda. Distributes agenda and consent items to EB in a timely manner.
- Assists the President in facilitating EB meetings, ensuring that parliamentary procedure is followed.
- Distributes and collects Conflict of Interest forms and other pertinent documentation to EB.
- Submits documents annually for the Affiliate Agreement to the Academy of Nutrition and Dietetics; gathers information from district leaders and communicates with California Academy's Treasurer to obtain financial documents.
- Returns messages (e.g., phone calls, email) from members, external organizations, and vendors within 48-72 business hours of receipt. Returns messages from EB, districts, and regions within 24-48 business hours of receipt.



- Creates and manages a calendar/timeline of California Academy and California Academy Foundation events.

D. Districts and Regions

- Collaborates with President, EB, and delegates to support and build capacity for district and region leaders to increase membership recruitment and engagement.
- Collaborates with the President in sharing membership data to district and region leaders.
- Ensures district agreements are completed and submitted to the Academy in a timely manner.
- Certifies that districts submit taxes in a timely manner.
- Assembles documents and/or other relevant information from district leaders on elections (e.g., candidate's headshot, bio); submits information to webmaster.

E. Annual Conference

- Researches and obtains quotes/bids for annual conference venues, food, exposition hall, and other items related to expenses or services for the annual conference. Presents quotes and bids to President, President-Elect, and Treasurer for review (final contract and venue selection based on EB board approval). Coordinates with California Academy liaison as needed to finalize the contract.
- Conducts conference venue site visits before final contract is signed, including meetings with event management.
- Creates and oversees annual conference budget as approved by the EB.
- Maintains and updates accurate Profit & Loss statements (pending Treasurer/EB approval). Reviews regularly with EB.
- Leads annual conference speaker coordination, including speaker contract negotiations, logistics management, and distributing speaker acceptance and non-acceptance letters.
- Drafts event marketing and promotional material with Communications Council, including student reception and poster sessions; reviews and approves final designs and assists with distributing materials via newsletter and other communication platforms.
- Coordinates Audio/Visual (AV) needs with venue and speakers; assists Treasurer (if needed) to obtain a contractor agreement, pending executive board approval.
- Manages venue contracts, including food and beverage selection, poster session and student reception logistics, and other conference-related events. Consults EB as appropriate.



- Serves as the liaison to the conference hotel and exposition hall.
- Assists in recruiting volunteers, creating a volunteer schedule, and delegating volunteer duties for the annual conference. Provides guidance to volunteers as needed.
- Collaborates with Sponsorship Chair/Committee to ensure conference sponsors abide by the policies set forth by California Academy and Commission on Dietetic Registration (CDR).
- Maintains and updates conference technology platform app. (e.g., Whova)
- Coordinates with hotel, event management, and exhibitors on materials and items for the exposition hall; communicates with hotel, event management and exhibitors on a regular basis to ensure all parties' needs are met based on contract.
- Assists President-Elect in planning pre-conference events and workshops.
- Coordinates registration table and attendee services, such as special accommodations, questions, parking validations, etc.
- Assists California Academy Foundation EB with planning an annual meeting and managing contracts with vendors to support Foundation's conference activities. Assists with reimbursements for conference activities, such as drawings and giveaways.
- Supports Poster Session Proposals by distributing poster session announcements; assists with updating poster application and scoring sheets for Education Council; contact poster session recipients; and secure room space for the poster sessions.
- Develops an evaluation summary report in conjunction with the President-Elect and President and present to the EB, including number of attendees per membership status, profits, revenues, and summarizes attendees' feedback on presenters, sessions, and other conference activities. Report must include metrics as requested by the EB.

F. California Academy Foundation

- Dedicates 25% of work time towards California Academy Foundation activities.
- Collects agenda and consent items for bi-monthly California Academy Foundation meetings and collaborates with Foundation Chair in developing agenda. Distributes agenda and consent items to Foundation EB in a timely manner.
- Assists California Academy Foundation Treasurer in preparing financial statements and reconciling financials.



- Communicates regularly with California Academy Foundation Chair on California Academy and Academy updates, events, and other relevant information.
- Assists California Academy Foundation EB in updating and reviewing Policy and Procedure manual and Strategic Plan.
- Provides support for California Academy Foundation's Scholarship Program:
 - Assists California Academy Foundation EB in updating sponsorship prospectus.
 - Maintains and updates scholarship and grant management platform (e.g., Kaleidoscope).
 - Communicates with scholarship donors on behalf of California Academy Foundation EB.
 - Collaborates with California Academy Foundation EB in creating new scholarships.
 - Deposits donation checks and mails checks to scholarship recipients.
 - Communicates/promotes scholarship announcements and deadlines via digital platforms.
 - Distributes notices for selected and non-selected scholarship recipients.
- Provide general guidance on how to integrate California Academy Foundation goals with California Academy goals, including collaboration with councils and committees.

G. Committees and Councils

- Serves as the ex-officio, non-voting member of all committees and councils, except for Human Resources and Nominating Committee.
- Provides general guidance to committees and councils on activities that are aligned with the goals and objectives of California Academy and Academy.
- Assists Public Policy Council in obtaining quotes, managing venue and vendor contracts, and reserving conference rooms and hotels for Advocacy Day event.
- Assists the Education Council in events or activities as it aligns with the goals of the California Academy and approved by the EB.
- Collaborates with Immediate Past President in updating awards and nomination applications; assists Immediate Past President in distributing and promoting awards and nomination applications to members; notifies award recipients and coordinates recipients attending Annual Conference Awards Ceremony.



H. Communication, Outreach, and Promotion

- Assists in distributing EB approved content through monthly newsletter in conjunction with Vice President (VP) Communications and Communications Council.
- Assists in promoting California Academy events and activities, California Academy Foundation events and activities, scholarships, awards, nominations, town halls, committee and council events, region activities, and other updates via newsletter, social media, and website in conjunction with the VP Communications/Communication Council.
- Assists in distributing Delegate's Desk Newsletter in conjunction with Delegates.
- Collaborates with EB, councils, committee members, and California Academy Foundation EB to create and/or update public-facing documents, such as flyers and promotional materials.
- Develops and implements marketing and communication strategies to enhance California Academy and California Academy Foundation's visibility.
- Collaborates with the Communication Council to manage digital and print communication platforms to be utilized for California Academy and California Academy Foundation.
- Communicates with webmaster to update EB approved content as needed within 72 hours of request, unless specified as urgent (24 hours) and approved by EB.
- Updates website content that abides by the guidelines set forth by the Americans With Disabilities Act.
- Maintains, posts, and updates social media platforms to increase visibility, ensuring alignment with the approval of the EB) and strict adherence to the social media policy/guidelines established by the Academy and CA Academy. Additionally, oversees the management, posting, and updating of the website, handling responsibilities like job postings, document uploads, graphics, nominations, awards applications, content, hyperlinks, photos, the California Academy Foundation webpage, and other relevant items.
- Collaborates with Communications Chair/Committee on obtaining graphics and reviewing and posting web content.
- Makes recommendations to EB on current and relevant technology platforms to promote California Academy services.



III. Minimum Requirements

To be considered eligible for this proposal, you must meet the following qualifications:

- Must be incorporated as a “third-party association management company.” For this RFP, a third-party association management company is defined as an organization that has an existing infrastructure to manage day-to-day operations, fiscal responsibilities, and administrative tasks for non-profit organizations that are based in California.
- Must have experience operating as a third-party association management company for a minimum of five (5) years.
- Must have experience preparing and submitting taxes for non-profit organizations based in California.
- Must have experience with working with volunteer-led professional associations. Experience with dietetics associations, healthcare professionals or organizations employing Registered Dietitian Nutritionists is preferred.
- Strong communication skills (written, verbal) and experience with communications tools, including social media.
- Availability to attend in-person events and virtual meetings, including some evenings and weekends.
- Ability to cultivate and maintain effective relationships with EB members, association members, sponsors, and other stakeholders.
- Experience with legislative advocacy and working with lobbyists.

IV. Proposal Submission

Eligible companies are invited to submit a detailed proposal outlining their qualifications, experience, and approach to meeting the association management needs of the California Academy. The proposal should have 1” inch margins and the font size should be no smaller than 11-point. The maximum page limit is **15 pages. Please abide by the page length and guidelines or your proposal will be rejected.**

In the proposal, include the following sections:

- A. **Background** – describe your company’s history, mission, vision, and organizational structure.
- B. **Experience** – describe your company’s relevant experience managing non-profit organizations, professional associations and/or volunteer-led organizations. Highlight experience understanding California tax laws for non-profits and managing healthcare or nutrition focused organizations.



- C. **Services** – describe what services your company can offer to California Academy. How do these services align with the mission and vision of California Academy? What services does your company provide that supports diversity, equity, and inclusion in the workplace and/or community?
- D. **Staff Capacity** – describe what resources, training or programs that are offered or required for staff to complete as it relates to the goals of California Academy. How do staff stay informed and updated on California tax laws and non-profit management operations?
- E. **Budget** – develop a budget or financial proposal for all the fees and associated costs as it relates to scope of services described in the Scope of Services section of this RFP.
- F. **References** – list the contact information (name, phone number, and email address) of three (3) references from organizations of similar size and scope for which the company has provided management services.

V. RFP Questions

You will have an opportunity to submit questions about your proposal by **Friday, February 9, 2024 at 5:00 pm Pacific Standard Time** by sending an email to hrcommittee@dietitian.org. Use the subject line “RFP Proposal Question.” Depending on the nature of the question, the Human Resources Committee will determine if it is appropriate and to what content they may answer the question(s) to ensure a fair and equitable process for all eligible applicants.

VI. Proposal Deadline

All proposals must be received by **Friday, March 1, 2024 at 5:00 pm Pacific Standard Time**. Proposals must be submitted via [Request for Proposal Association Management Submission Form](#). Late submissions will not be considered.

VII. Proposal Review Process

The California Academy Human Resources Committee will review all proposals. The evaluation criteria will include, but will not be limited to:

- A. Experience and Qualifications
- B. Organizational and Staff Capacity
- C. Services and Mission Alignment
- D. Budget
- E. References



The California Academy reserves the right to reject any or all proposals received. Interviews will be conducted with selected companies as needed to further evaluate qualifications and alignment.

VIII. Notification of Finalists

Finalists will be notified if their proposal has been selected by Monday, April 15, 2024 via email.

IX. Contact Information

For general inquiries regarding the RFP, please contact the Human Resources Committee at hrcommittee@dietitian.org.