REQUEST FOR PROPOSALS

Virtual Assistant Services

About the Organization:

The Canadian Society of Professional Event Planners (CanSPEP) is a dynamic, diverse and innovative society of entrepreneurial Event Professionals with a leading national voice in the event industry. We are the ONLY association in Canada that offers exclusive membership to the entrepreneurial event professional, and their team.

We were formed in 1996, and since then have provided our members forums to exchange ideas, develop skills through educational programs and create a public awareness around the profession of event planning. Industry suppliers get involved through our volunteer committee and showcase their products and services to our members through advertising and events.

Our membership represents a diverse group of experienced businesses professionals that cater to clients in the corporate, association, government and not-for-profit sectors, as well as the special events market.

Full details on the association can be found on our website.

Additional Information:

In 2020, due to the global pandemic, and in an effort to ensure our association thrives, the CanSPEP Board of Directors made the difficult decision to move from a full-service association management firm to a 100% volunteer-run model. The Board of Directors, Committees, and Membership at-large worked tirelessly to ensure the continued success of the organization, and as a result, are now ready to start using the services of a Virtual Assistant to complete administrative day-to-day tasks on behalf of the organization.

The Role:

We anticipate the successful candidate to perform tasks as outlined below for no more than 40 hours per month. This opportunity is open to both CanSPEP members, and non-member candidates.

We are seeking a 3-month trial, and proving successful, we will look to secure these services on an annual contract basis.

The Proposal:

Proposals received should contain the following information:

- A short outline about you / your company
- Bio & resume of who will be serving this account, including social media profile links (LinkedIn at a minimum)
- Outline of which of the tasks (if not all) you intend on performing, as described in this RFP, and how they will be performed
- Pricing for the scope of work you have outlined in your proposal
- Your operating hours
- Your ability / willingness to work evenings and weekends, as required
- References

Timelines:

- **RFP issued**: Wednesday, June 30, 2021
- **Questions due**: Friday, July 9, 2021
- **Responses provided**: Friday, July 16, 2021
- **Proposals due**: Friday, July 30, 2021 (5:00 PM Eastern time)
- **Review of proposals & interviews conducted / References checked**: By Friday, August 13, 2021
- **Decision made**: Week of August 16, 2021
- **Contract signed**: By August 31, 2021
- **Start date**: Tuesday, September 7, 2021

Please submit all questions and proposals to the attention of Meagan Rockett, DES (CanSPEP President-Elect) presidentelect@canspep.ca

Scope of Work:

General Administration (4-8 hours per month):

- Serve as the head office address of the association
- Checking phone messages & re-directing to the appropriate portfolio
- Manage the general inbox for the association (info@canspep.ca)
    - Forward inquiries to appropriate board member / committee member

Executive Committee (5-7 hours per month):

- Compile board reports and submitted agenda; distribute to board members and invited guests (monthly)
- Board Meeting minutes – recording and distribution / filing in appropriate folder (monthly)
- Issuing invoices for partnerships on behalf of the Secretary-Treasurer, as required

Education (2-5 hours per month):

- Issue speaker agreements for educational events, as required
- Advise VP, Education when agreement is signed, and what the terms of the agreement are so they can be fulfilled

Events (2-5 hours per month):

- Set up event pages on our website and registration portal, as required
- Add industry events to the calendar, as needed
- Provide VP, Events with update on registration numbers and breakdown
- Pull MS-Excel list of registrations per event, in advance for on-site fulfillment, or virtual engagement

Marketing (8-10 hours per month):

- Basic maintenance of our social media accounts (Facebook Company Page, LinkedIn Company Page, Twitter Account, Instagram Account); 2-3 posts per week
- Basic graphic creation for social accounts / newsletter promotion (with guidance from VP, Marketing); through Canva
- Assist VP, Marketing in the programming and issuing of our newsletter (monthly)
- Provide VP, Marketing with engagement rates on social accounts and email marketing results for board reports

Membership (2-4 hours per month):

- Provide VP, Membership with list of new members, lapsed members for committee follow up (monthly)
- Assist the VP, Membership in sending emails to active members as it relates to RFPs submitted, member benefit promotions, etc. (as required)

Partnership (2-5 hours per month):

- Issue sponsor agreements, as required
- Advise VP, Partnerships when agreement is signed, and what the terms of the agreement are so they can be fulfilled
- Assist VP, Partnerships in gathering the information from the sponsor to fulfill details of partnership agreement
- Maintain spreadsheet of sponsors, what fulfillments have been completed, and what needs to be completed

Other Duties (to be completed if hours are available under contract – assessed monthly):

- Assist the Board of Directors in the update and maintenance of the CanSPEP database (members, prospective, members, partners), as required
- Assist the Board of Directors in maintaining their filing system (BaseCamp); as required
- Other duties as assigned and mutually agreed upon.