



## **REQUEST FOR PROPOSALS**

HeritageRail Alliance (the organization) is the champion and facilitator of a strong and vibrant heritage rail community in North America, acting as the collective voice of railway museums and tourist lines and leading by example through innovation, education, and advocacy. The 501 (c)6 nonprofit organization maintains over 175 institutional members and dozens of commercial members.

### **INTRODUCTION**

The organization is seeking proposals from qualified firms or individuals to provide administrative services, membership services, financial services, marketing, conference planning, and other related tasks. The services requested are critical to the smooth operation of the organization and require attention to detail, organizational skills, and responsiveness to members' needs. The organization seeks an engaged, detail-oriented partner who can fulfill the following responsibilities under the outlined scope.

### **SCOPE OF SERVICES**

The successful proposal will include the following services:

#### **Board Management**

- Assist the President with the development and distribution of meeting agendas and supporting documents.
- Assist with the distribution of meeting minutes.
- Attend Board of Directors' meetings.
- Assist with the development, publication, and updating of the Board meeting calendar.
- Support committees in developing and distributing agendas and meeting reports.

- Organize, file and house legal documents and the corporate seal.
- Maintain electronic copies of bylaws, policies, and minutes, updating them as needed.
- Assist with Board communications.

### **Administrative Services**

- Maintain an office for the organization, including receiving mail and express packages.
- Provide equipment and software to efficiently manage the organization's administrative and communications requirements as summarized below.
  - Wild Apricot - membership management and contacts database; event registration; annual meeting notice communications for members-only; platform for members-only section of website, including library; online store for the Journal.
  - MailChimp - email newsletters and blasts
  - WordPress - website platform
  - Facebook - primary social media channel
  - Authorize.net - Payment processor for credit card transactions
  - GoDaddy - web domain registration and security certificates
  - Hostgator - (via Website Administrator) - Manage relationship / backend Internet
  - Wells Fargo (for deposits) primary banking
  - Cvent App (To be discontinued when contract runs out.) The app used at some Fall conferences, also known as CrowdCompass. It serves no function other than being an electronic version of the printed conference program.
- Respond courteously and promptly to telephone and email requests, routing to the appropriate volunteer leader as necessary.
- Manage member communications including emails, mailings, and general correspondence.
- Maintain adequate supplies of stationery, brochures, and printed materials.

### **Financial Services**

- Receive dues and other payments to the organization.
- Deposit payments promptly and send deposit summaries to the organization's Treasurer.
  - Familiarity with Quickbooks is a plus but not required. The Organization's Treasurer is required to maintain Quickbooks accounts.

### **Membership Services**

- Maintain an accurate and current membership database and prepare membership reports for Board of Directors' meetings.
- Review membership applications for eligibility and send new member packets promptly.

- Assist with the development, distribution, tabulation, and reporting for the annual membership renewal drive.
- Maintain a supply of membership information kits for distribution.
- Update membership applications and renewal notices with the organization's logo and branding.
- Develop sponsorship packages and present to commercial members.
- Develop and distribute a monthly e-newsletter highlighting news and other items of interest.

### **Web Site Services**

- Maintain and update content for the organization's website, posting current information in coordination with the President or their designee.
- Our Website address is [www.heritagerrail.org](http://www.heritagerrail.org)

### **Advocacy and Governmental Relations**

- As requested, represent the organization at Museums Advocacy Day and other related events and meetings.
- As requested, attend meetings with other organizations of interest to the HeritageRail Alliance such as the Rails-to-Trails Conservancy, American Alliance of Museums, American Short Line and Regional Railroad Alliance, etc.

### **Marketing Services**

- Perform specific marketing tasks as requested by the Marketing Committee Chair and approved by the President.

### **Conference Planning Services**

- Currently the organization offers a spring (smaller) and fall (main, larger) conference event, with locations changing each year.
- Guide the conference host with goal development, provide a checklist and schedule for conference planning, and assist with specifications for hotel rooms, meeting space, and exhibit space.
- Assist with the development of exhibitor/sponsor packages and communications.
- Manage online and mailed-in registrations, prepare necessary reports for the host institution and the Treasurer.
- Develop printed and/or online marketing materials and distribute them.
- Collect presentations from speakers, obtain release authorizations, and prepare for posting on the website.
- As requested, make site visits to inspect potential conference locations.

- If conference hosts fail to meet planning requirements, provide additional planning services to ensure success of the conference.

### **Miscellaneous Tasks**

Perform small tasks that extend the scope of our activities, including but not limited to:

- Facebook postings on behalf of members.
- Creation of website and emailed news blasts.
- Assist members with requests for information.
- Creation of additional web pages to support ongoing efforts.

### **PROPOSAL REQUIREMENTS**

Proposals must include the following:

1. **Cover Letter:** A brief summary of the firm's qualifications and experience relevant to the scope of services outlined.
2. **Company Profile:** Background information on the proposer, including relevant experience, staff qualifications, and examples of similar projects successfully completed.
3. **Detailed Work Plan:** Outline of how the proposer intends to complete the tasks described in the scope of services. Include timeframes and resources available for each task.
4. **Listing of Software Programs to be Utilized:** As outlined above, the organization currently uses several online programs and/or software to carry out important administrative tasks. Would the software programs remain the same, or are substitutions proposed?
5. **Fee Schedule:** A clear outline of fees. The fee must be expressed in a flat monthly rate to include a schedule with hourly rates and additional charges for travel, materials, or other expenses. Proposals should clearly define any variable costs and provide an overall monthly/annual cost estimate.
6. **References:** At least three references from organizations or companies where similar services have been provided.
7. **Insurance Information:** Statement of insurance coverages the proposer feels may be necessary to fulfill the duties of the position.

### **EVALUATION CRITERIA**

Proposals will be evaluated based on the following criteria:

1. **Experience and Qualifications** - Proven experience in providing similar administrative, membership, and conference planning services.

2. **Proposed Work Plan** - The feasibility and clarity of the proposed plan to meet the outlined services.
3. **Fee Structure** - Competitiveness and transparency of the proposed pricing.
4. **References and Reputation** - Strength of provided references and general reputation within the industry.

#### **A NOTE ON TIME COMMITMENT OF THE ROLE**

The organization considers this position to be part time with weekly time commitment ranging from 8 hours to a maximum of 28 hours depending on the current activities of the organization.

This role is not intended to be filled by someone who desires to be an employee of the Heritage Rail Alliance. All submittals must come from Sole Proprietors, Limited Partnerships, Corporations, or individuals acting as Independent Contractors.

#### **SUBMISSION DEADLINE**

All proposals must be received by July 30<sup>th</sup>. If necessary the request for proposals will be reposted, the Request for Proposal will remain open until filled.

#### **A NOTE ON TRANSITION**

The current administrator will remain engaged for training, transition and sharing of tasks through December 31<sup>st</sup> 2025. The new administrator will take full responsibility of the role on January 1<sup>st</sup> 2026. During this transition period fees may be prorated between both entities.

#### **SUBMISSION / CONTACT INFORMATION**

Please submit proposals via email to Lynette Rickman.

For any questions or clarifications, please contact:

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Executive Director Heritage Rail Alliance  
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(770) 378-7344

Our Website address is [www.heritagerail.org](http://www.heritagerail.org)

**HeritageRail Alliance** looks forward to reviewing your proposal. Thank you for your interest in assisting our organization in achieving its mission.