



Request for Proposal

Overview

The **Association Education Alliance (AEA)**, a collaborative of distributor-oriented trade associations, seeks to ensure the organization's evolution and ongoing joint activities designed to enhance the effectiveness of each member organization by providing access to best-practices sharing, success stories, provider recommendations and turnkey educational programs and events.

AEA seeks to be a highly collaborative alliance in which the synergies of the member associations are leveraged to develop a menu of valuable offerings that each member organization can choose to market to its members. As such, AEA is soliciting proposals from prospective Association Management Companies (AMCs) or similar entities that can deliver best-in-class services that will assist in redefining AEA's strategic imperatives and governance model while also providing financial management, membership services, and marketing and meeting/event support.

Successful bidders should have demonstrated experience working with trade associations and the key functional areas listed above. Ideally, bidders should have experience working with distributor-based associations as well as coalitions of trade associations working together on mutually beneficial strategic objectives.

AEA's success will be defined by numerous qualitative and quantitative factors, including the improved stature of the alliance within the distributor association community. This heightened stature may thereby result in increased member recruitment and retention, new partnerships, programs and, consequently, financial growth for AEA.

About AEA

AEA is an Illinois limited liability company. Member associations pay an annual capital contribution. All members in good standing are provided the right to attend AEA meetings and opt into AEA-developed programs and events. Each member association is granted one vote relative to AEA decisions and affairs.

Mission:

Through collaboration, AEA develops and supports relevant, quality and affordable programs for its member associations and promotes a culture of open communication and sharing to strengthen collaboration and drive results.

Objectives

- Continually enhance industry education and training through UID to ensure it retains its reputation as cutting-edge and a "must-attend" program.
- Ensure its communications and in-person meetings are informative and relevant to member needs.

- Provide new services and programs for its member associations that will benefit their constituencies.
- Create a collaborative culture that allows for and encourages the free flow of discussion and sharing.

Formed in 1991 and organized as an LLC in 2005, AEA currently represents approximately 40 leading trade associations serving wholesale distributors and their partner manufacturers across all major distribution channels. AEA's value proposition is based on providing a stimulating forum for association staff to unite and learn from each other.

Additionally, AEA has a successful history of developing collaborative initiatives designed to facilitate the delivery of quality education and training programs that each member association is invited to sponsor and market to their members as an association-branded offering.

The most successful AEA offering is an annual in-person conference branded as the University of Innovative Distribution (UID) held in partnership with Purdue University and marketed by AEA associations to their members.

The volunteer leaders of AEA, who are association executives/managers, are seeking a new management partner who can help grow AEA's membership base, enhance its peer group forums, ensure the ongoing success of its UID, and supports its strategic planning process to ensure its ongoing relevancy and advancement of its mission.

Scope of Work

AEA is seeking an AMC or similar entity to oversee all back-of-house administrative functions, including financial management, membership, marketing and event services. The chosen partner also will manage all third-party relationships, such as legal, Purdue University, speakers, trainers and event support vendors.

Membership:

- Coordinate annual dues renewal process to include invoicing of capital contributions, collections outreach and payment record tracking.
- Generate annual renewal report for the volunteer leaders.
- Maintain a roster of current members.
- Create marketing collateral and messaging to support new member inquiries.
- Perform outreach to prospective members encouraging them to join the alliance.
- Establish and maintain an AEA website that features both a public platform featuring AEA benefits and a members-only section featuring relevant peer group meetings, programs and UID content.
- Establish and maintain a speaker referral database as a core member service.
- Establish a member chat platform to facilitate member communications and Q&A.

Peer Group Meetings:

Work with the AEA Chair and Officers to schedule no more than two in-person meetings annually and virtual meetings as needed. Includes site selection, contracting and logistics as well as agenda development and recording of minutes.

University of Innovative Distribution:

Work with Program Chair and other partners to execute a successful 600-person program. Includes educational strategy development and execution, speaker discovery and contracting, marketing kit, online and on-site registration management, on-site event logistics and financial reconciliation. Financial reconciliation includes tracking attendance by association and coordinating royalty payouts post-event based on the number of attendees that each sponsoring association attracted to the event.

UID is a concentrated educational program focused on the unique needs of the wholesale distribution industry. Since its inception in 1994, UID has become known worldwide for excellence in education. UID is sponsored by AEA in cooperation with the Department of Technology Leadership and Innovation of Purdue University. Working together, these groups take great pride in providing a superior learning experience.

At the conclusion of attending UID, attendees receive, via email, an official Letter of Completion issued by Purdue University awarding 30 hours (3 CEUs – Continuing Education Units) for satisfactory completion of the program. These CEUs may be applied toward a Professional Certificate in Innovative Distribution, which can be earned after successful completion of 90 hours (9 CEUs) of approved course work. A minimum of 30 hours must be earned through UID participation. Additional credits may be derived from courses taken independently or through the attendee's trade association (the AEA member association). Attendees who have earned the required 90 hours are eligible for the Purdue certification. Certification applications are reviewed several times a year with certification awards made shortly thereafter.

In 2023, UID included 52 sessions and 33 speakers/instructors. Some instructors presented more than one course. At any given time, 9 or more courses may be running simultaneously/concurrently. The event has historically run from Monday to Thursday morning.

Attached is a sample schedule from 2023 along with a task grid.

In 2024, UID is scheduled to take place March 11 – 14, in Indianapolis at the JW Marriott.

Annual Webinar Series:

Utilizing UID speakers or other partners, build and deploy a 3- to 4-part webinar series. Includes content development, speaker contracting, marketing kit, registration management and virtual event logistics.

Other Functions:

- Monthly financial reporting.
- Annual budget development.
- Procurement of required insurance and corporate filings as required.
- Management of AMS/website to promote AEA and its members as well as maintain accurate membership records.

Proposal Submission and Deadline/Decision Dates

Submission Launch Notification: Wednesday, April 26, 2023

Submission Deadline Date for Responses: Tuesday, May 30, 2023

Initial (Video) Interviews/Conversations With Candidates: June 1-2 and 5

Initial Report to AEA Members: AEA June Meeting

Final Interview Dates (in person if possible): June 12 – 13, 2023

Anticipated Decision Date: June 16, 2023

Submit Responses to: **Sarah West, AEA Chair, swest@pei.org, 918-640-5138**; Sarah will distribute to Mark Swets, First Vice Chair, and Bryan White, Immediate Past Chair

Evaluation Process

All proposals will be reviewed and evaluated by AEA officers. The top two candidate organizations will be interviewed in person if possible.