



Request for Proposal (RFP)

Association Management Services

Proposal Due Date: September 28, 2026

Submit Proposals To:

Dave Butler, Principal, Butler Strategies

Email: dave@butlerstrategies.us

Phone: (916) 505-6602

Introduction

The Colorado Society of Anesthesiologists (CSA) is seeking proposals from experienced Association Management Companies (AMCs) to provide comprehensive management services beginning January 2027.

The selected AMC will serve as the Society's headquarters and provide a full range of association management services, including membership growth, governance support, active engagement with public policy and advocacy, meetings and events, financial management, and PAC fundraising and administration.

The final candidate firms will be invited to participate in a **90 minute in-person interview** with members of the selection committee on **Sunday, October 18 between the hours of 12 and 5pm in San Diego, CA** during the American Society of Anesthesiologists' Annual Meeting.

About CSA

The Colorado Society of Anesthesiologists (CSA) is a non-profit professional association (501c6) representing over 800 licensed physicians in the state of Colorado who are engaged in the practice of, or otherwise specifically interested in anesthesiology. The Colorado Society of Anesthesiologists is a recognized component society of the American Society of Anesthesiologists. The CSA was incorporated in 1983

Website: www.csa-online.org

Vision

The CSA will be a leader in defining and advancing the standards of anesthesia care in Colorado

Mission

To advance and further both patient safety and the practice of anesthesiology in Colorado through education, representation and advocacy for the anesthesiologists of Colorado

Core Beliefs

- Anesthesiology is the practice of medicine.
- The patient's care and safety is our highest priority.
- Physicians are the individuals who are the best trained and most experienced in the provision of anesthesia services to the patients of Colorado.
- Anesthesiology is a medical subspecialty involving the perioperative care of all surgical patients, the treatment of both acute and chronic pain, and the care of critically ill patients in intensive care units.
- Research and education raise the standards of the medical practice of anesthesiology.
- The public should be protected against irresponsible and unqualified practitioners of anesthesiology.

Overview

CSA is considered a medium-size state component society of the American Society of Anesthesiologists. Given the current economics of medicine and anesthesia care in particular, AND the challenging policy environment in Colorado and at the national level, **CSA must become bigger....bigger** in terms of membership numbers and revenue, bigger in terms of political influence with the Colorado state legislature, and bigger in terms of amplifying its message both internally and externally.

Much of CSA's current activity flows around its board of directors, overseeing the operations of the association, engaging in policy development and implementation, enhancing member engagement with a primary focus on residents and early career physicians, and internal and external communications. To become bigger, more effective and more robust, CSA must expand opportunities for active and meaningful engagement for individual members.

Current management consists of approximately 2.5 full-time equivalent (FTE) staff members. Lobbying services and Communications services are provided by contracted consultants, while website hosting is contracted separately. The American Society of Anesthesiologists (ASA) provides networking and best practice information on governance, member engagement, and communications and is an active partner with state legislative and regulatory activity. CSA leaders also provide active support to ASA governance activities and federal policy and PAC activities. The selected AMC will be responsible for working collaboratively with and managing the work of contractors, working with ASA staff on membership growth and engagement strategies and supporting CSA leaders engaged in ASA governance, policy and political action activities.

Strategic Priorities

CSA seeks an AMC partner capable of moving beyond day-to-day management to become a strategic advisor focused on organizational growth.

Current priorities include:

- Develop and implement advocacy and communications plan in partnership with consultants
- Increase membership
- Improve member recruitment and retention.
- Increase engagement among active members, early career physicians and residents
- Expand educational offerings and revenue opportunities.
- Strengthen operational efficiencies while maintaining exceptional member service.
- Develop and execute a plan to increase PAC contributions
- Organize, populate, direct and staff two new committees: Advocacy and Membership

Organizational Activities

The selected AMC will support and manage the following ongoing activities:

- Support state level advocacy and PAC activities in partnership with CSA leadership and communications lobbying consultants
- Support federal advocacy and PAC activities in partnership with CSA leadership and ASA congressional relations staff
- Annual CSA Legislative Day in Denver
- Membership recruitment, onboarding, renewals, and invoicing
- Quarterly webinar series
- 3-5 regional networking meetings each year
- Executive Committee meetings (monthly)
- Board of Directors meetings (three online, one in person)
- Annual Membership Business Meeting (online)
- Committee administration
- Website updates and maintenance coordination
- Annual Education Meeting (anticipated 2028)

Anticipated Travel Requirements

Travel, hotel and meals paid by CSA, consistent with board reimbursement policy

- CSA Legislative Day, Denver, 1 day
- ASA Legislative Conference, Washington, DC, 3 days
- ASA Annual House of Delegates Meeting, location varies, 4-5 days
- ASAE CEO Symposium, location varies, 3 days

Financial Overview

Total Assets: \$1.2 million

Fiscal Year 2025

- Total Revenue: \$338,674
- Total Expenses: \$316,439

Fiscal Year 2026 Budget

- Budgeted Revenue: \$273,000
- Budgeted Expenses: \$329,116

Estimated annual budget for Association Management Services:
\$85-95,000

Estimated annual budget for PAC Management Services
\$5,000 (PAC or GF)

Scope of Services

The selected AMC will provide comprehensive management services including, but not limited to:

Executive Management

- Serve as Association headquarters
- Executive Director leadership
- Strategic planning development and implementation
- Annual work plan development
- Policy administration
- Governance support
- Vendor management
- PAC Management

Board and Committee Support

- Executive Committee support
- Board meeting planning and logistics
- Committee administration
- Agenda preparation
- Meeting minutes
- Action item tracking
- Governance documentation
- Board Training
- PAC support

Membership Services

- Membership recruitment and retention
- Member Engagement
- Member onboarding
- Renewals
- Database management
- Member communications
- Customer service
- Membership reporting

Financial Management

- Budget preparation
- Financial reporting
- Accounts payable
- Accounts receivable
- Banking
- Investment coordination
- Cash flow monitoring

Meeting & Event Management (tent. 2028 meeting)

Management of all educational meetings including:

- Venue negotiations
- Contract management
- Registration
- Speaker coordination
- Mobile app/event technology
- On-site management
- Budget management
- Continuing education tracking

Sponsorship & Exhibitor Management

- Prospecting
- Sales support
- Contract administration
- Sponsor fulfillment
- Exhibitor coordination
- Relationship development and management

Website Administration

- Coordinate with the website vendor and perform:
- Continuous content updates
- Event updates
- Member information
- Policy Action Alerts
- General website maintenance

Communications

- Develop and post online content
- Manage and promote online platforms
- Regular membership newsletter
- Timely execution of advocacy alerts

PAC Management

The CSA Political Action Committee is a separate organization governed by its own Board of Trustees but managed by the same AMC. Services include:

- Board support
- Financial management
- Meeting coordination
- Executing financial contributions
- Fundraising strategy and support/management
- Annual/quarterly/as needed reporting

Desired Qualifications of the Association Management Company (AMC)

CSA seeks a strategic partner that is committed to helping the Society achieve its mission and long-term vision. The selected Association Management Company should possess the experience, expertise, and resources necessary to provide exceptional operational support while serving as a trusted advisor to the Board of Directors and leadership.

CSA is seeking an Association Management Company that will function as an extension of the organization—providing not only operational excellence but also strategic insight, innovative ideas, and measurable results that will support the Society's continued growth and success.

Preference will be given to firms that demonstrate the following qualifications:

Association Management Experience

- A proven track record of successfully managing professional associations or nonprofit organizations of similar size and complexity.
- Experience serving healthcare, medical, dental, or other professional membership organizations is preferred.
- Experience with board training and leadership development practices

Public Policy and Advocacy

- Demonstrated experience and insight into the importance of public policy and advocacy
- Demonstrated collaborative spirit and experience leading and supporting coalitions
- Track record of directly supporting state and federal advocacy activities
- Demonstrated experience working with electronic tools to assist in advocacy alerts
- Demonstrated ability to organize and engage members in grassroots advocacy activities

Political Action

- Demonstrated ability to manage revenues, expenditures and reporting of PAC activities
- Demonstrated success in raising PAC funds from members and large donors

Membership Growth & Engagement

- Demonstrated success in developing and implementing membership recruitment, retention, and engagement strategies.
- Experience achieving measurable membership growth through innovative programming, marketing, and member outreach.
- Ability to leverage membership data and analytics to improve retention and identify growth opportunities.

Strategic Leadership

- Experience partnering with Boards of Directors to develop and implement strategic plans.
- Ability to provide proactive recommendations that advance organizational goals and improve operational effectiveness.
- Experience facilitating organizational growth, governance best practices, and volunteer engagement

Meeting & Event Management

- Comprehensive experience planning and managing statewide and regional educational meetings, webinars, and virtual events.
- Expertise in budgeting, contract negotiations, registration management, speaker coordination, sponsorship fulfillment, and onsite event management.

Financial Management

- Strong nonprofit financial management capabilities, including budgeting, financial reporting, accounts payable and receivable, audit coordination, investment oversight, and compliance with nonprofit accounting standards.
- Experience supporting annual audits and IRS reporting requirements.

Sponsorship & Business Development

- Demonstrated success in securing and retaining sponsors, exhibitors, advertisers, and strategic partners.
- Experience identifying and developing non-dues revenue opportunities that support long-term organizational sustainability

Technology & Association Systems

- Experience utilizing modern Association Management Systems (AMS), Learning Management Systems (LMS), Customer Relationship Management (CRM) platforms, event management software, and online collaboration tools.
- Ability to recommend and implement technology solutions that improve member experience and operational efficiency.

Communications & Marketing Support

- Ability to coordinate member communications, website content management, digital marketing initiatives, promotional campaigns, and advocacy initiatives in collaboration with CSA's contracted professionals.

Client Service & Organizational Culture

- A demonstrated commitment to responsive client service, professionalism, transparency, and collaborative partnerships.
- A staffing model that provides continuity, accessibility, and expertise across all service areas.

Transition & Change Management

- Experience successfully transitioning organizations from incumbent management teams with minimal disruption.
- A well-defined implementation process that includes communication planning, knowledge transfer, technology transition, and continuity of member services.

Proposal Requirements

Company Profile

- Company history
- Mission and values
- Office locations
- Organizational structure
- Number of employees
- Association client portfolio

Why Your Firm?

Describe why your firm is uniquely qualified to partner with CSA and support its strategic objectives.

Service Approach

Describe your approach for each area within the Scope of Services.

Proposed Staffing

Provide proposed staffing including:

- Organizational chart
- Primary account executive
- Team members
- Responsibilities
- Estimated FTE allocation

Transition Plan

Provide a detailed implementation plan including:

- Transition timeline
- Knowledge transfer process
- Technology transition
- Communication plan
- Risk mitigation strategies

Pricing Proposal

- Annual Association Management Fees
- Annual PAC Management Fees
- Annual adjustment (if any)
- Term of contract

Please identify any additional fees not included in the base management fee.

References

Provide three current association clients comparable in size and complexity.

Include:

- Organization name
- Primary contact
- Phone
- Email

Evaluation Criteria

CSA will evaluate proposals using a comprehensive review process designed to identify the Association Management Company that best aligns with the Society's mission, strategic objectives, operational needs, and organizational culture. Selection will not be based solely on price. Instead, proposals will be evaluated on overall value, demonstrated experience, staffing approach, strategic capabilities, and the firm's ability to support the long-term growth of CSA.

The Selection Committee may request additional information, conduct interviews with finalists, and contact client references as part of the evaluation process.

Proposals will be evaluated using the following weighted criteria:

Evaluation Criteria

Relevant Association Management Experience Experience managing professional associations or nonprofit organizations of similar size and complexity, preferably within healthcare or related professional industries.	20%
Strategic Growth & Membership Development Demonstrated success increasing membership, improving retention, enhancing member engagement, and supporting organizational growth through strategic planning and innovative programs.	20%
Public Policy and Advocacy Demonstrated experience in implementing public policy, advocacy and associated communications strategies to support and association's state and federal policy and political objectives.	15%
Scope of Services & Technical Approach Ability to effectively deliver the full range of requested services, including governance, financial management, policy and advocacy, communications, meetings and events, education, sponsorship support, and PAC management.	15%
Proposed Staffing & Organizational Fit Qualifications and experience of the proposed team, staffing model, responsiveness, depth of resources, and overall compatibility with CSA's culture and leadership	10%
Financial Proposal & Overall Value Competitiveness, transparency, and completeness of the proposed fee structure, along with the overall value provided relative to the services offered	10%
Client References & Past Performance Feedback from current or former clients regarding service quality, responsiveness, professionalism, strategic partnership, and measurable results	10%

Total Possible Score: 100 Points

Additional Evaluation Considerations

In addition to the weighted scoring above, CSA may consider the following factors when selecting the successful proposer:

- Demonstrated understanding of CSA's mission, vision, and strategic priorities.
- Experience supporting volunteer-led organizations and nonprofit governance.
- Ability to provide innovative ideas and best practices that enhance member value.
- Ability to support technology initiatives, including Association Management Systems (AMS), Learning Management Systems (LMS), event platforms, and website administration.
- Demonstrated success in sponsorship development, non-dues revenue generation, and business development.
- Quality and feasibility of the proposed transition and implementation plan.
- Commitment to collaboration, communication, responsiveness, and long-term partnership.

Following the proposal review, the Selection Committee may invite one or more finalists to participate in interviews and presentations. The final candidate firms will be invited to participate in a **90 minute in-person interview** with members of the selection committee on **Sunday, October 18** between the hours of **12 and 5pm in San Diego, CA** during the American Society of Anesthesiologists' Annual Meeting.

Finalists should be prepared to discuss their proposed staffing model, transition approach, strategic recommendations for CSA, and responses to questions from the Selection Committee before a final recommendation is made to the Board of Directors.

Procurement Timeline

September 15	Publish RFP
September 15-27	Question Period
September 28	RFP Closes
October 2	Select Final Candidates
October 18	Conduct in person interviews
October 27	Select Preferred AMC
November 13	Forward Draft Services Agreement
November 20	Board Approves Final Services Agreement
November 23	Begin Transition
December 18	Complete Transition
January 1	Service Agreement Begins
Week of January 4	Host Welcome Meeting

Terms and Conditions

The Colorado Society of Anesthesiologists (CSA) reserves the right to modify or cancel this Request for Proposal (RFP) at any time and for any reason. Submission of a proposal does not obligate CSA to award a contract or to reimburse any costs incurred in the preparation or submission of a proposal.

By submitting a proposal, the proposer acknowledges and agrees to the following terms and conditions:

Reservation of Rights

CSA reserves the right to:

- Reject any or all proposals received in response to this RFP.
- Waive informalities, technicalities, or minor irregularities in any proposal
- Request clarification, additional information, or supplemental documentation from any proposer.
- Negotiate with one or more proposers regarding the scope of services, staffing, pricing, or contractual terms.

- Select the proposal that, in the judgment of CSA, represents the best overall value, even if it is not the lowest-priced proposal.
- Cancel, postpone, or reissue this RFP at any time without liability or obligation to any proposer.
- Conduct interviews, request presentations, or perform site visits as part of the evaluation process.
- Verify information provided in proposals and contact references, current clients, or other professional references.

Proposal Costs

All costs associated with the preparation, submission, presentation, or negotiation of a proposal shall be the sole responsibility of the proposer. CSA will not reimburse any expenses incurred during the procurement process.

Confidentiality

Proposals submitted in response to this RFP will be treated as confidential to the extent permitted by law and will be used solely for the purpose of evaluating prospective Association Management Companies. Proposers should clearly identify any proprietary or confidential information contained within their submissions.

Proposal Validity

Proposals shall remain valid for a minimum of **120 days** following the proposal submission deadline unless otherwise agreed upon in writing by both parties.

Conflict of Interest

Proposers shall disclose any actual or potential conflicts of interest that may exist with CSA, its Board of Directors, officers, committees, or affiliated organizations. Failure to disclose known conflicts may result in disqualification.

Contract Negotiation

Selection as the preferred proposer does not constitute a binding agreement. A contractual relationship will be established only upon successful negotiation and execution of a mutually acceptable written agreement approved by the CSA Board of Directors.

Transition Expectations

The selected Association Management Company will be expected to work collaboratively with the retiring management team to ensure an orderly and seamless transition of operations, records, financial information, technology systems, membership data, and organizational knowledge.

Equal Opportunity

CSA is committed to conducting a fair and impartial procurement process. All qualified Association Management Companies will receive equal consideration without regard to race, color, religion, sex, age, national origin, disability, veteran status, sexual orientation, gender identity, or any other status protected by applicable law.

Questions Regarding the RFP

Questions regarding this RFP must be submitted in writing by the date specified in the Procurement Timeline. Responses to substantive questions will be shared with all known prospective proposers to ensure a fair and transparent procurement process.

Acceptance of Terms

Submission of a proposal constitutes the proposer's acknowledgment that it has read, understands, and agrees to the terms and conditions outlined in this Request for Proposal.

Independent Contractor

AMC shall at all times remain an independent contractor. AMC and its employees are not employees of CSA.

Proposal Contact

Questions regarding this RFP should be directed to:

Dave Butler, Principal, Butler Strategies

Email: dave@butlerstrategies.us

Phone: (916) 505-6602

Attachments

The following documents are included with this RFP:

- CSA Bylaws
- Financial Statements
- FY2026 Operating Budget
- Strategic Plan (currently under development)

CSA appreciates your interest in partnering with our organization and looks forward to reviewing your proposal.