



REQUEST FOR PROPOSAL

DATE: March 18, 2025

Objective

ACE is looking for an organization to manage the association on a contract basis.

Background

The Association of Cooperative Educators is a Canadian and U.S. nonprofit, membership organization (tax exempt in the United States) that brings together educators, researchers, cooperative members, and cooperative developers from across cooperative sectors and national borders. The resulting crosspollination of ideas enhances cooperative development, strengthens cooperatives, promotes professionalism and improves public understanding. ACE members come from across the globe with the majority of the membership residing in Canada, Puerto Rico and the United States.

Vision

To strengthen cooperatives and the cooperative movement by promoting innovative educational responses to social and economic changes.

Mission

To provide members a forum to highlight programs and practices that increase understanding, innovation and professionalism in cooperative education.

ACE benefits cooperative education and the cooperative movement by:

- Promoting cooperative research
- Developing linkages between universities, cooperatives and supporting organizations
- Building capacity to support the development of innovation and acumen in cooperatives
- Spreading the word by providing resources on cooperative education

Current ACE Management

ACE is currently managed under an agreement with Impact ON, based in Toronto, Canada. Under this agreement, Impact ON provides the organization the services of an executive administrator, membership coordinator and administrative support such as bookkeeping and accounting. Impact ON additionally publishes a periodic electronic ACE Newsletter, maintains the ace.coop and ed.coop websites, and coordinates the annual Institute conference.

ACE currently operates on an annual budget of about \$160,000 (CDN) per year, based on direct membership fees, sponsorships, institute registrations and grant funding. At present, roughly \$50,000 (CDN) a year is currently spent on ACE administration.

The ACE board periodically reviews and revises its strategic plan, a copy of the 2025-2027 Strategic Plan is attached.

The ACE board hopes to engage with a new contractor for ACE management by June 2025 and hopes to have the new contractor attend this year's board meeting and Institute on July 8 to July 11 in Montréal, Quebec. Our goal is to ideally have the contract begin July 1, 2025, to provide a 3-month overlap with Impact ON (with whom our contract terminates September 30, 2025) to ensure a smooth transition.

Service requested

The board of directors of ACE would like to engage an organization, on a contract basis, to oversee the administration of ACE and support the annual Institute conference, the flagship event for the organization. Services needed include the following tasks:

Institute Conference Responsibilities:

1. Communication: Reporting to the ACE Board of Directors regularly and facilitating monthly (or as needed) Institute Planning Committee meetings. Conference close-out, including evaluations report, statistical report, and financial accounting.
2. Site: depending on the location, the conference organizer may be required to visit the conference site during the planning stage and collaborate closely with people or organizations available to help at the Institute site. Finalize contract negotiations at site selected by ACE; coordinate food, lodging, and logistics for and at the conference; serve as primary contact with site staff. On-site conference management to ensure smooth operation.
3. Fundraising: work with the board to create sponsor/donor appeal materials, conduct sponsor outreach, draft grant applications, receive individual donors, assist with fundraising planning, and lead implementation.
4. Finances: ensure conference expenses do not exceed budget; manage budget and post-conference closeout.

5. Marketing: facilitate communication strategy with ACE Institute Planning Committee chair/contact on the creation and dissemination of a reminder postcard/e-notices, email publicity, social media and website content updates. Hire and supervise a graphic designer to create conference program materials.
6. Accessibility: providing the infrastructure to make sure the conference is an open and accessible environment to people of all race, class and gender backgrounds. This includes maintaining the organization's commitment to provide access as much as practicable in ACE's three official languages: English, French, and Spanish.
7. Program planning: work with the ACE Board of Directors and the Institute Planning Committee to determine the keynote topic and presenters, plenary topic and presenters, workshop topics and presenters, tours, entertainment, conference materials, and coordinating logistics for the silent auctions and awards presentations.
8. Registration: communication with individuals, Intake of all registrations including presenters, management of registration database, management of all income and payments, management of lodging assignments, logistics at the conference, financial follow-up after the conference.
9. Coordination: Coordinate volunteers prior to and during the conference, as needed.

Administrative Management Responsibilities:

1. Membership
 - Collect, organize and maintain the ACE membership records, and update as appropriate. Invoice members individually, recording payments received and tracking of payments overdue.
 - Solicit the annual membership renewal.
 - Collaborate with the ACE Institute Planning Committee Chair and the ACE Board of Directors in recruiting new members and retaining existing members.
2. Communications
 - Produce and send four (4) electronic newsletters per year to ACE members translated in three languages: English, French, and Spanish.
 - Manage ACE emails regarding membership and information for the newsletters.
 - Update information on the ACE website and ed.coop
 - Promote and represent ACE during academic or cooperative events.
3. Accounting

- Collect funds and handle finances for ACE's general operations.
 - Invoice vendors and pay bills, keeping a record of ACE's financial obligations and budgets.
 - Use QuickBooks to manage and enter transaction details of the PayPal account, and the organization's bank/credit union accounts in Canada and the United States.
 - Coordinate with professionals for Tax filings, Agent of Record status, Business status in Minnesota Secretary of State, Insurance for Directors & Institute Liability insurance, if needed.
 - Provide a financial report 1) to the treasurer at least one week prior to each board meeting, 2) for approval at each quarterly board meeting, and 3) as needed.
4. Resource Development & Strategic Planning
- Lead development and fundraising efforts for ACE. Engage, in coordination with the board, in fundraising activities such as creating sponsor/donor appeal materials, draft grant applications, and receive individual donations. Assist with fundraising planning and lead implementation.
 - Support the ACE board in its strategic thinking and implement the organization's strategic plan.
5. Board Support & Reporting
- Organize agenda in communication with the board chair (or proxy) & facilitate arrangements, communications, and materials for regular board meetings.
 - Provide draft of meeting minutes to the chair and board secretary within 10 days of each meeting for review and edits before distribution to the full board.
 - Provide quarterly written updates to the ACE Board of Directors on the membership status and other key activities.
 - Ensure follow-ups on important dates (i.e.: membership renewal, election process, annual meeting).
 - Compile information in order to produce ACE annual reports.

REQUIRED QUALIFICATIONS

ACE is looking for an organization that can provide a designated administrator for ACE and provide services to support tasks outlined above or subcontract and manage contracts to provide these services:

Qualifications - Administrator:

- Individual already identified as a cooperative education leader
- Well-connected and involved with key clientele
- Experience working with multicultural organization or groups

- Innovative and dynamic
- Able to communicate ACE identity
- Grant writing experience
- Able to outsource as needed and manage contractors
- Able to work with board and others on program planning and other projects
- High degree of personal organization
- Thorough knowledge of cooperative principles and structures
- Familiarity with the ACE membership and their needs and interests, as well as with other cooperative support organizations
- Familiarity with information sources on cooperatives, education, research and other issues important to the membership
- Computer literacy and familiarity with web-based delivery of services. Basic Office and online
- Conference and Meeting planning experience

Qualifications – Organization

- Stable organization with commitment to cooperative education
- Depth beyond designated administrator
- Access to resources such as: IT, web, meeting coordination writing and editing, graphic design, data base management, accounting, clerical and administration

PROPOSAL DETAILS

Proposals must be submitted electronically to Charity Schmidt (charity.schmidt@wisc.edu), chair of the ACE board, by April 30, 2025.

All proposals should include:

1. An outline of how your organization will use internal and external resources to perform the work outlined above.
2. Complete list of qualifications of organization and staff to be involved in ACE administration.

Proposal consideration and project timeline

The contract will be awarded by June 1st, subject to the quality of proposals received and a successful contract negotiation with the ACE board.

CONTACT:

Charity Schmidt

Chair, Association of Cooperative Educators (ACE)

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