

# **Association for Budgeting and Financial Management**

## **Request for Proposals to Serve as ABFM Secretariat**

**January 22, 2023**

### *Background*

The Association for Budgeting and Financial Management (ABFM), a section of the American Society for Public Administration (ASPA), has established in its bylaws (Article VI, Section 5) the role of Secretariat. ABFM is now accepting proposals from an academic institution or a team of academic institutions interested in serving as the Secretariat.

### *Expected Activities of the Secretariat*

The Secretariat fulfills multiple roles, including secretary, archivist, and operations manager. The Secretariat is expected to maintain section relationships with ASPA and facilitate the day- to-day operations of ABFM. Specifically, the Secretariat performs the following roles, and the response to this RFP should detail how the host plans to meet these expectations.

### Leadership and Membership

- Maintain a list of the current Executive Committee and Committee Chairs. This list should include name, ground mail address, phone numbers (voice and fax) and email addresses.
- Share updated email lists with Newsletter Editor as needed.
- Maintain membership records with ASPA and ABFM-only membership. The Secretariat will work with ABFM's Membership Chair to monitor membership changes. The Secretariat will reach out bi-annually through emails or other correspondence with new members, to welcome them, and those who have dropped their membership, to encourage membership renewal.

### Operations and Governance

- Establish, in coordination with ABFM leaderships and Newsletter Editor, an annual schedule of planned tasks, such as conference updates, elections, and timing of newsletter content.
- Establish, with ABFM leadership, a policy for retaining records that includes what to retain, where to store it, and for how long.
- Ensure that all members of the Executive Committee are notified of the date and time of each Executive Committee meeting.
- Attend and produce minutes of all ABFM Executive Committee meetings, at the annual conference as well those conducted online and/or by telephone or teleconferencing. Produce minutes within a week of meetings. Archive all meeting minutes electronically, following review by the ABFM Executive Committee.

### Communication

- Manage the flow of content through ABFM's website, with particular emphasis on: notifications regarding the annual conference; job postings; highlighting ABFM members' blogs, Twitter feeds, or other social media content; relevant links to the ABFM newsletter or other relevant association newsletters; other relevant content. Note that the Secretariat is not expected to create content, but rather to review and facilitate publication on the website content created by ABFM members.
- Coordinate with Newsletter Editor so that material is also updated in Line-Item newsletter and delivered electronically to members in a timely manner, ideally bi-monthly, and especially in the weeks prior to the annual ABFM conference.

### Document and Website Management

- Maintain and preserve a variety of digital documents, both current documents and archives, to be housed at ABFM's website and off-website. This includes: all relevant Association documents such as the bylaws, template award and appointment letters, policies, and timelines; conference papers; syllabi and other teaching materials; and other relevant documents. Archival documents include conference programs, quarterly newsletters, meeting minutes, and financial records.
- Create mechanisms to share archival information with ABFM officers as they transition year to year. Process for sharing archives, and backing up, and updating.
- Perform routine technical maintenance of ABFM's website. This includes regular updates to security protocols; new site functionality as needed; adding storage capacity and other capacity as needed. If necessary, the host institution should plan to contract with web design/maintenance professionals for these services. If the host institution intends to contract, the RFP response should describe that potential contracting relationship.

#### Elections

- Arrange for the annual elections for new members of ABFM's Executive Committee and ABFM's Vice Chair. This requires preparing and testing electronic ballots as well as distributing and processing electronic ballots using the membership lists obtained from ASPA and from ABFM-only membership.

#### Journal

- Provide current membership list to Publisher (Wiley) as needed for members to receive paper or electronic copies of *Public Budgeting & Finance*.

#### Conference Activities

- Provide for the production of plaques for the Wildavsky, Howard, Curro, and Posner awards; for the outgoing Chair; and for any new awards. Have the plaques ready for the annual conference.
- Attend the annual ABFM conference and pay the registration fee.
- Oversee conference activities including online registration, mechanism for proposal submissions, supporting sponsorship communications, and process for on-site.
- Coordinate preparation and printing of conference program and preparation of signage for conference with Chair-Elect and Conference Host (may be done by Conference Host or volunteer).

#### Other

- Coordinate with successor Secretariat for a smooth and comprehensive transition.
- Perform other duties as assigned/requested by Chair and/or the Executive Committee.

In each of the above expectations, the RFP response should be clear on the extent of the host's commitment (e.g., financial and staff resources).

#### *Principal Contact*

The host institution of the Secretariat should name the principal contact person and contact information for the duration of this agreement.

#### *Time Period*

The response to this RFP should indicate the commitment to enter into an agreement for the host site to serve as the ABFM Secretariat for a period of three years, with renewals subject to a new RFP. The parties to the agreement can expand the terms upon mutual agreement.

### *Financial Commitment*

The RFP response should indicate how the host will provide administrative resources to handle these responsibilities, such as through the allocation of a portion of the time of full-time administrative staff, graduate assistants, and/or faculty. Administrative costs of the Secretariat should be shared by the host and ABFM as negotiated in response to this RFP.

### *Response Timetable*

Institutions responding to this RFP must do so by **March 10, 2023** and in a PDF submitted to ABFM's Chair-Elect, Christine Martell ([Christine.Martell@ucdenver.edu](mailto:Christine.Martell@ucdenver.edu)). Please direct any questions regarding this RFP to Christine Martell. A target decision date is **April 1, 2023** to allow transition and commencement of the new contract on **May 1, 2023**.