



# Society *for* Freshwater Science

## Request for Proposals

### *Membership Management Services 2024-2029*

The [Society for Freshwater Science](#) (SFS, the Society) is seeking a long-term partnership with a contractor to provide membership management services over a five-year period, from August 1, 2024 to July 31, 2029. Services requested include:

- (1) Establishment and maintenance of a web-based membership portal; as appropriate, integration with the extant public-facing Society website and annual meeting website.
- (2) Transitioning and importing of extant membership database and Society documents archive from the current membership management services provider.
- (3) Management, maintenance, and reporting of membership records.
- (4) Archiving and provision of membership access to important Society documents and records (annual reports, committee minutes, etc.).
- (5) Implementation of annual member recruitment and renewal campaigns, including automated email campaigns.
- (6) Processing of membership payments, printed journal subscription fees, and donations by credit card, check, and purchase order.
- (7) Management, maintenance, and reporting of financial records associated with membership.
- (8) Implementation of annual Society elections by electronic ballot.

This RFP seeks proposals from qualified individuals/firms. Proposals should address all the services listed above. The search committee prefers all-inclusive costing covering all services described below (Scope of Membership Services A-E)—either through a flat monthly fee or a per-member annual fee. Proposals also should specifically describe the number of staff that will be involved and their specific duties. SFS reserves the right to contract the provider for all services outlined in this RFP or selected elements. Questions should be addressed to the Society Executive Director, Andreas Leidolf ([exec.director@freshwater-science.org](mailto:exec.director@freshwater-science.org); 435-757-7640).

## **Proposal Requirements**

### **A. Schedule**

1. The deadline for receipt of proposals is March 15, 2024, at 23:59 p.m. MST.
2. Proposals will be reviewed by the Society Membership and Conference Management Services Task Force, Finance Committee, Council of Underrepresented Voices, and Board of Directors. Telephone interviews may be conducted with a short list of submitters as deemed necessary. A decision will be made within ca. 2 months of proposal submittal.
3. The Society will enter into fee negotiations with the selected provider. The provider and SFS will then work together to develop a specific partnership agreement for services.
4. Membership management services are expected to commence on August 1, 2024.

### **B. Statement of Qualifications (limited to 20 pages)**

1. Staffing, including primary point of contact (account manager), and brief biosketches of key personnel that highlight their experience and their roles/assignments to this account.
2. Evidence of working with other non-profit (501(c)(3)) organizations or similar accounts.
3. Examples of experience working with other scientific, membership-based organizations necessitating provision of similar services as outlined below.
4. A 1-2 page statement summarizing qualifications, resources, and other characteristics that make the proposer uniquely suited for provision of the requested services, including software tools, databases, and apps used for membership records management and communications.
5. A statement on the proposer's commitment to the core values of diversity, equity, and inclusion.
6. Data privacy statement

### **C. Cost Proposal**

1. Proposers may prepare a cost proposal in line with their customary fee structure and billing practices.
2. Preference will be given to all-inclusive cost proposals based on a flat monthly fee or an annual per-member fee.
3. The cost proposal is to be included as an Appendix to the Statement of Qualifications and will not count toward the 20-page limit.

## **Our Background**

SFS is an international scientific organization whose purpose is to promote further understanding of freshwater ecosystems (rivers, streams, lakes, reservoirs, and estuaries) and ecosystems at the interface between aquatic and terrestrial habitats (wetlands, bogs, fens, riparian forests, and grasslands). The society fosters the exchange of scientific information among the membership, and with other professional societies, resource managers, policymakers, educators, and the public. Society members study genetics to community structure of freshwater organisms, freshwater ecosystem function, physical processes that affect freshwaters, and linkages between freshwater ecosystems and surrounding landscapes. Applied aspects of their science include habitat and water quality assessment, conservation, fisheries and invasive species management, integrated water resource management, and restoration.

## **History of SFS**

The Society was founded as the Midwest Benthological Society by 13 charter members at Havana, Illinois, in the spring of 1953. The first annual meetings attracted the Midwest's best benthic scientists, which led to rapid increases in membership and a diversification within the society. Later renamed the North American Benthological Society (NABS), and most recently the Society for Freshwater Science, the society has expanded from its early and ongoing specialization in stream insect ecology to include a range of disciplinary interests from genes to landscapes. SFS has also expanded from its core focus on lotic freshwater ecosystems to benthic habitats in wetlands, estuaries, and oceans, and to the riparian and shorelands.

The Society also hosts a journal, *Freshwater Science*, in partnership with the University of Chicago Press. The membership management services provider will work closely with UC Press, Society staff, and members of the SFS Editorial Board to ensure members are well served whether they are receiving an electronic or hard copy version of the journal.

## **Current Society**

Today SFS enjoys its status as a premier international organization of aquatic scientists interested in a wide range of various scientific endeavors including environmental impact assessments; ecology and taxonomy of microbes, algae, invertebrates, and fish; carbon and nutrient dynamics; watershed dynamics; hydrology and geomorphology; conservation and restoration. SFS encourages interdisciplinary exchange through its meetings and journal publications. The SFS membership varies year over year, ranging from 1,000 to 1,750 and averaging around 1,500 members—a large percentage of which are students. Additionally, SFS has 10 active regional Chapters, with many Society members choosing to add one or more Chapter memberships to their general Society membership. The SFS members derive largely from North America; however, approximately 15% of our membership is composed of individuals from around the globe, with representation from 40+ countries. The membership also crosses many employment sectors: academia, private consulting, and federal, state, provincial, and municipal governments.

SFS commitments to interdisciplinary, international, and inter-institutional exchange and mentorship of young scientists have positioned SFS as a leader in integrative aquatic science. The Society's well-attended annual meeting consistently draws participation from 750 to 1,000 members and non-members. In addition, the Society occasionally engages in joint meetings with one or more sister societies; and participates in the [Consortium of Aquatic Science Societies'](#) (CASS) [Joint Aquatic Sciences Meeting](#) (JASM) when held. The fact that most of the Society membership is North America-based means that, in practicality, most meetings are held in the U.S. or North America. However, the Society recently held its first meeting outside of North America ([Freshwater Sciences 2023](#) joint meeting with the Australian and New Zealand Freshwater Science Societies in Brisbane, Australia) and plans to continue to incorporate occasional international meetings into its meeting calendar. In a post-Covid world, SFS is also interested in continuing to increase opportunities for virtual and/or hybrid meetings and meeting participation, and to further operationalize and implement its new [Annual Meeting Philosophy](#) for the 2027 Annual Meeting and beyond.

### **SFS Vision, Core Values, and Goals**

#### Vision:

The Society for Freshwater Science (SFS) will be a vibrant, inclusive, and diverse community dedicated to advancing, applying and translating science for the health and vitality of freshwater ecosystems and the services they provide.

#### Core Values:

- *Promoting excellence in freshwater science:* SFS is dedicated to advancing freshwater science to understand fundamental properties of aquatic ecosystems, promoting interaction across the disciplinary breadth of freshwater science, and applying our science to improve freshwater policy and management.
- *Sustaining a supportive, cooperative, and open scientific community:* SFS is rooted in a welcoming and collaborative community committed to maintaining and growing that community through its publications, annual meetings, mentoring and training programs and associated activities.
- *Advancing diversity, inclusivity and equity in freshwater science:* SFS recognizes the inherent value of diversity, inclusivity, and equity in freshwater science. SFS is dedicated to becoming a more diverse and equitable society through inclusion, where all scientists are welcomed and their voices heard, thus promoting diverse perspectives and representation in freshwater science.
- *Developing and supporting freshwater scientists:* SFS is dedicated to the development of students and early career freshwater scientists and practitioners, and to supporting the continued development of all freshwater scientists throughout their careers.

## Goals:

1. Elevate the Society by maintaining and improving the annual meeting, the flagship publication *Freshwater Science*, and the communication tools used for in-reach and outreach.
2. Translate and communicate freshwater science to policy makers, managers, and the general public.
3. Improve equity, inclusivity, representation and a sense of belonging at SFS meetings, welcoming all freshwater scientists.
4. Increase the diversity of the community of practitioners of freshwater science.
5. Increase membership, including regional and international participation, and promote the field of freshwater science globally.
6. Support the professional development of all members across all career stages through specific programs and actions.
7. Increase efforts to train the next generation of freshwater scientists by supporting graduate and undergraduate students and early career scientists.
8. Continually seek new and innovative ways to improve communication among and services to our members.

## **Scope of Membership Services**

### A. Member Services

1. Act as the main point of contact for all membership inquiries by current and prospective members, whether by telephone, facsimile, or physical or electronic mail. Telephone inquiries will be accepted during regular business hours via a dedicated toll-free line. After hours, members shall be able to leave voice messages and their calls will be returned the following business day. Email inquiries will be accepted via a dedicated address and are expected to receive a response within 24 hours.
2. Establish and maintain a password-based membership website with the ability to create and display member profiles, maintain and track a range of membership categories, as well as Chapter memberships, renew membership, accept payment for membership or journal subscription fees and donations, conduct electronic ballots, disseminate news, and store and access “members only” content. As appropriate, integrate the membership website with the Society’s extant public-facing website and annual meeting website. In collaboration with the Society, explore and implement as appropriate creative solutions to member retention (e.g., autorenewal, multi-year memberships) and/or ease of renewal (e.g., one-click renewal). Support members who experience difficulty accessing the website (lost user name, lost password), preferably in a real-time, automated manner.
3. Add both static (annual reports, meeting minutes) and dynamic (news, membership renewal messages, fundraising campaigns, demographic data drives, elections notifications, etc.) member content provided by the Society to the membership website and organize content in a manner that simplifies access and facilitates engagement or supports member activation.

4. Create a membership list, in pdf form, at least once annually that can be posted on the “members only” website.
5. Maintain a membership directory, in accordance with the [SFS Privacy Policy](#), that can be accessed by current Society members.
6. Create, at a minimum, a membership form that can be completed online in real time; as well as a pdf membership form that can be downloaded and sent in via electronic or physical mail. Process all membership applications/renewals submitted in this manner.
7. Provide information about member benefits and services to new and renewing members upon joining/renewing.
8. Provide information about members with paid subscriptions to printed copies of the Society journal to the Society Publishing Partner (quarterly, upon request).
9. Conduct an annual membership renewal campaign in coordination with Society staff and volunteers involving, at a minimum, (a) automated, personalized invitations and repeat reminders to renew sent via electronic mail; and (b) the ability to target different audiences with customized messaging.
10. On request, process membership applications in batches, bypassing the automated individual membership renewal process (e.g., gift memberships, complimentary memberships offered to participants in select Society programs).
11. Conduct the annual Society elections via electronic ballots housed within the membership website, including, at a minimum, (a) displaying information about candidates for office; (b) automated, personalized invitations and repeat reminders to vote; (c) tallying of votes once ballots are closed; and (d) reporting and archiving of ballot outcomes.
12. Conduct fundraising campaigns upon request, including, at a minimum, (a) displaying information about fundraising aims and goals; (b) creation and maintenance of a fundraising webform; (c) automated, personalized invitations and repeat reminders to renew sent via electronic mail; and (d) the ability to target different audiences with customized messaging.

**B. Membership Records Management and Maintenance**

1. Maintain membership records using an unlimited number of data fields, which shall include updating, merging and reviewing membership records to insure that all information, including information about membership dues and the payment thereof, is current and complete.
2. Devise a system to identify and eliminate duplicate member entries in the database.
3. Update the membership database monthly; prepare a monthly summary membership report and submit to the Society Treasurer and Finance Committee Chair by the 15<sup>th</sup> day of the following month; prepare an annual,

- detailed membership report including demographic information and submit to the Society Membership and Data Committee Chair.
4. Maintain records of past members for at least 4 years to facilitate reengagement with lapsed members.
  5. Facilitate access to the membership database for authorized SFS representatives and in accordance with the SFS Privacy Policy.
  6. Respond, within five (5) business days, to any requests for membership data by authorized SFS representatives and in accordance with the SFS Privacy Policy.
  7. Track membership history to identify lapsed members in an attempt to renew the relationship between SFS and such lapsed members; distinguish renewing members versus new members; and certify eligibility for emeritus member status.
  8. Interface with the Society meeting management services provider to verify member registrations for the annual meeting.
  9. Use best practices for data privacy and security to minimize the risks of breaches.

C. Membership Development

1. Work with Society staff and volunteers to explore, develop, and implement new membership recruitment strategies to grow the Society membership over time.

D. Financial Services

1. Receive membership fees, print-journal subscriptions, and donations via internet, fax or mail; and made by credit card (Visa, American Express, MasterCard, and Discover), check, or purchase order; clearly indicate any applicable payment processing fees.
2. Use best practices for data privacy and security to minimize the risks of breaches.
3. Prepare a monthly summary financial report (a) indicating nature and amounts of funds received and fees deducted, as well as (b) providing donor information for the purpose of acknowledgment; and submit to the Society Treasurer and Finance Committee Chair by the 15<sup>th</sup> day of the following month.
4. Transfer any funds collected for and owed to the Society, minus applicable fees, to the Society monthly by the 15<sup>th</sup> day of the following month, clearly.

E. Membership Website Services

1. Establish, host, and maintain Society membership website; integrate with the Society's extant public-facing website and annual meeting website as appropriate.

2. Maintain the server/website 24 hours/day, 7 days/week, 365 days/year with technical support available during normal business hours.
3. Respond promptly to any service interruptions (within 24 hours of receiving notice of such deficiencies with a diagnosis of the problem and an estimate for return to service).
4. If feasible, enable self-posting by the Society Communications and Media Specialist and other authorized SFS staff or volunteers.