

Request for Proposal
Central Association of College and University Business Officers (CACUBO)
Registration Management Services
Issued August 17, 2010

The Central Association of College and University Business Officers is seeking a provider to manage registration services for professional development activities of the Association. The provider chosen must be a service oriented company/organization that has demonstrated experience in managing the conference/workshop registration and payment process for professional associations and educational institutions.

History of the Central Association of College and University Business Officers

The Central Association of College and University Business Officers, hereinafter referred to as CACUBO, was formally organized in 1912 to improve college and university financial management and business administration and to promote the profession's ideals, ethics and standards. Throughout its history, CACUBO has:

1. Provided professional development opportunities, as well as leadership training, for all levels of staff in business and financial management,
2. Provided effective, concerted action in all matters affecting the financial welfare of institutions of higher education, and
3. Supported the mission and goals of the National Association of College and University Business Officers (NACUBO).

CACUBO members represent institutions large and small, public and private, from community colleges to small independent institutions to large research institutions. Since its inception, CACUBO has offered business officers in the North Central area of the United States opportunities to develop professionally, share thoughts, problems and solutions, enjoy a forum for professional and social contact with colleagues, and speak in concerto on matters affecting higher education.

CACUBO is a volunteer led association, without paid staff, that operates using a committee structure. Since its founding, CACUBO has grown to 650 member institutions/organizations. CACUBO is organized and is operated exclusively for charitable and educational purposes within the meaning of Section 501 (c) (3) and 170 (c) (2) (B) of the Internal Revenue Code of 1986 (or corresponding provisions of any future United States Internal Revenue Law).

Scope of Work/Responsibilities

CACUBO is seeking a business partner to manage the registration services for its professional development opportunities. Currently, the programs include:

- CACUBO Annual Meeting—Estimated attendance of 450-650 (October)

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- Winter Workshop—Estimated attendance of 100 (February)
- Higher Education Workshop—Estimated attendance of 125 (June)

Specific registration services for the above programs include but are not limited to:

Pre-Event Requirements and Event Planning

- Identify and dedicate staff person who will be responsible for CACUBO events
- Develop preliminary registration budget for each event
- Develop detailed early and on-site registration processes including number and schedule for support staff from provider as needed
- Work with CACUBO to design registration form for each professional development event—CACUBO will provide all specifications applicable to the collection of registration data.
- Design registration confirmations, name badges, rosters, and on-line management reports
- Receive all registration information and payments on-line or through mail or fax
- Accept registration payment via credit card (VISA, MasterCard, American Express and Discover), cash, check or money order
- Outline any fees charged by credit card companies for use of point-of-sale machine
- Invoice individuals, institutions, and organizations, as necessary within 7 days to collect unpaid amounts from registrations received
- Record registration transactions into the registration database and account for payments
- Provide confirmation of registrations either electronically or by fax or mail
- Manage banking services
- Provider will maintain a U.S. bank account and lockbox post office services in the name of CACUBO
- Collect registration data in accordance with standards determined by CACUBO
- Provide customized name badges for attendees in accordance with CACUBO specifications

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- Prepare manual documenting registration process and procedures for each professional development site
- Work with CACUBO on process for determining Continuing Education Units (CEU) for professional development program attendees

On-Site Registration

- Option 1: Provide on-site registration and payment procedures as requested by CACUBO
- Option 2: Provide on-line software for CACUBO Annual Meeting Host Committee to enter registrations on site, and have the ability to print and revise name badges

Exhibitor and Sponsor Registration

- Work with CACUBO Business Partner Coordinator on registration for exhibitors and sponsors

Web Requirements

- Provide registration website linked to the CACUBO website
- Design a professional online registration entry screen integrated into the look and style of the CACUBO website
- Provide on-line registration and payment system with secure credit card site
- Provide access to on-line registration data and reports that are password protected
- Design online dynamic roster of attendees for each event that permits users to create custom rosters using a simple search screen

Post Conference and Other Requirements

- Provide and distribute final event registration and financial reports within 45 days of the meeting

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Term of Contract

Registration management services will be for professional development events for three years beginning November 1, 2010 with consideration of two additional one-year renewals.

Submission Requirements

Inquiries and completed proposals are to be submitted to:

Mary L. Herrin
Vice President for Administration and Finance
Wichita State University
1845 N. Fairmount
Wichita, KS 67260-0047

mary.herrin@wichita.edu
316-978-3030

Please submit one signed copy of your response along with the Addendum plus an electronic version to the above contact person no later than September 23, 2010. Responses postmarked after the due date will not be considered.

Incomplete submissions may be ruled invalid or be at a disadvantage during the contract award assessment. The determination of CACUBO is final with respect to acceptance. CACUBO has the right to accept or reject RFP submissions at their discretion. CACUBO may also withdraw any part of this RFP and is not liable for any expense or cost incurred.

**Central Association of College and University Business Officers
Name of Company/University Submitting Bid
Addendum to the Registration Management Services RFP**

Note: This worksheet should be completed for each Professional Development event.

Professional Fee Component

Cost of Services

Event Set Up
Event Web Set Up
Golf Management/Optional Event Set Up
Full Registration
Spouse/Guest Registration
Custom Survey Processing (Preference Survey)
Attendee Billing
Third Party Billing
Credit Card Payments
Direct Payments (Non Lock Box)
Refund Processing
Additional Name Badge Requests
On-Site Rate-Principle
On-Site Rate-Specialist

The event set-up fee covers the immediate costs of beginning the project including establishing bank accounts and services, customizing software, reports and files.

The event web set-up fee covers web page design, implementation of on-line registration, development of dynamic attendee list, and setting up client password protected executive information.

Full registration is defined as anything other than a "spouse/guest" registration. This includes all categories of members (regular, provisional, associate, subscriber, affiliate), non-members, optional event only registrations and complimentary.