

**Request for Proposals:  
Executive Office of the American Risk and Insurance Association**

The American Risk and Insurance Association (ARIA) requests proposals from organizations interested in serving as the ARIA Executive Office for a 5 year term beginning January 1, 2021. To ensure the continuation of high-quality operation of the Office, we seek proposals from organizations with an institutional affiliation or other support, and an Executive Director with the qualifications to complete the required duties below.

**Summary of RFP**

ARIA is a group of approximately 400 academic and industry professionals focusing on the field of risk and insurance. The Executive Office of the American Risk and Insurance Association connects the members with the association. More specifically, the Executive Director provides the infrastructure to support the organization's annual meeting and various board and committee meetings, and provides oversight of the organization's finances and financial obligations. Each of these duties is described more fully below. We have attempted to be specific in describing the Executive Director's responsibilities, but we are also interested in creating new ways for organizing the Executive Office. In addition, the requirements of the Executive Director are listed. The deadline for responses is April 15, 2020. Please send your response to Dean Richard Phillips, Chair Search Committee, rphillips@gsu.edu.

**The Executive Office Duties**

The duties of the Executive Director involve leadership and administrative responsibilities. The Director will be accountable for all functions of the Office, but he/she may delegate some administrative or routine responsibilities to other individuals or organizations.

Annual Meeting. The Association has an annual meeting in August each year. The executive office is responsible for meeting planning services prior to the event, coordination with the program chair regarding the call for papers and program development, coordination with the organizational leadership to prepare for the Board of Directors meeting, and staffing the meeting (registration and information desk). Specific duties related to the Annual Meeting include:

- Creating/updating conference meeting platform with vendor (registration and abstract)
- Creating/updating conference mobile app
- Update aria.org link to current conference
- Coordinating with Program Chair the conference timeline, including development and release of the Call for Papers
- Creating Annual Meeting logo/design
- Create Annual Meeting programs, including electronic and print versions of Annual Meeting conference program and awards luncheon program
- Creating and updating annual meetin marketing materials for sponsors

- Promoting the Call for Papers to partner associations and organizations
- Promoting attendance at meeting and reporting out on meeting results (This is captured via our meeting platform now)
- Taking minutes at the annual Board of Directors' meeting and preparing the minutes for Board distribution.
- Taking minutes at the General Business meeting and preparing the minutes for membership distribution
- Soliciting sponsors for the annual meeting.
- Requesting reports from committee chairpersons for inclusion in a Board meeting packet.
- Preparing registration packets, sending to all members, handle meeting registrations
- Sending complimentary registrations to qualifying sponsors and plenary speakers; sending reimbursement checks to same when applicable.
- Handling all meeting preparations, including:
  - Negotiating and confirming hotel arrangements, i.e., meeting rooms, meals, on and off-site receptions, photography, logistics (including audio-visual equipment requirements)
  - Coordinating with Award Committee Chairs and providing results to Board for approval
  - Notifying award winners; preparing award certificates and checks
  - Sending invitations to functions, as directed
  - Preparing attendee packets and all materials included
  - Preparing and print annual meeting and awards luncheon programs
  - Preparing posters, room signs, etc.
  - Staffing a table for registrants to pick up meeting packets
  - Arranging to be on-site and centrally located during ARIA meetings for troubleshooting purposes
  - Working with the annual meeting hotel to coordinate social activities.
  - Providing necessary materials for the business meeting.
  - Providing necessary scripts/itineraries for ARIA President, President-elect, and program chair

Mid-year Board Meeting. The ARIA Board has a mid-year meeting in January each year. The Executive Office is responsible for meeting planning services prior to the event, and staffing the meeting. Duties at the mid-year Board meeting mirror those at the board meeting that occurs at the Annual Meeting. Duties include:

- Taking attendance at meeting
- Taking minutes at the meeting and preparing afterwards for board distribution.
- Obtaining committee and Journal reports for Board review
- Developing a pro-forma annual budget for Board review (January only)
- Providing an Executive Director's Report to the Board
- Providing ARIA financial statements to the Board
- Providing an update of ARIA's managed investments portfolio to the board
- Distributing an electronic copy of the reports to Board members before the meeting; make paper copies for assembly into the Board packet; and provide the packet at the meeting.
- Processing reimbursement checks for Board members and meeting site expenses.
- Arranging Board appreciation dinner(s); managing invitations to Board as well as ARIA session presenters and discussants at ASSA conference (where Board meeting is held)

Remainder of Year. The Executive Office handles a variety of other duties throughout the year. These duties include:

- Communicating with members through a weekly listserv email that posts job positions, calls for papers, and announcements for conferences and meetings. Preparing the Board for strategic planning meetings
- Collaborating with journal publisher (currently Wiley Blackwell) concerning publisher contract renewals and membership issues.
- Serving as liaison between the membership and the ARIA Communication Executive (ACE); monitoring ACE performance, and providing compensation based on a monthly work schedule.
- Responding to individual inquiries for information or assistance.
- Providing accounting and financial services for the organization, including maintaining ARIA's checking, money market, and mutual fund accounts, posting income and paying invoices upon receipt, depositing funds in investment accounts in accordance with the organization's Investment Policy, recording these transactions in Excel spreadsheets or an appropriate financial software package.
- Processing journal submissions fees from non-ARIA members.
- Providing Journal Editors and Assistant Editors with contractually obligated stipends as scheduled.
- Contracting for and paying all ARIA insurance.
- Arranging for annual audit of ARIA's funds and filing financial records as necessary.
- Maintaining the membership database in coordination with the publisher.
- Maintaining ARIA records, including: Corporate charter and by-laws, copies of contracts, minutes from all previous meetings, ARIA financial records, archival records and past issues of *The Journal of Risk and Insurance* and *Risk Management & Insurance Review*, and Director's office records.
- Maintaining and updating sponsorship contact list, send annual meeting sponsorship solicitations and other solicitations as requested.
- Providing updates on ARIA.org website
- Conducting the annual Board directors and officers elections once the slate is confirmed by the Nominations Committee. Gathering all nominee bios and sending to all members; providing advance notice of forthcoming elections, conduction elections in accordance with bylaws and validating results.
- Handling unique requests for action, e.g., assisting in contract negotiations with third parties.
- Engaging in special projects
- Working with the treasurer of the Risk Theory Society to provide travel support and record keeping.
- Communicating with the associated organization such as the Risk Insurance Teaching Society when necessary.
- Sourcing future Annual Meeting locations for Board evaluation and approval

**Estimated Commitment - Executive Director:**

- 20-25 hours per week for three weeks leading up to the annual meeting

- 35 hours (four full days) for travel and attending the annual meeting
- 20 hours per week for the two weeks leading up to the mid-year meeting
- 14 hours (two days) for travel and attending the mid-year meeting
- 5 hours per week for routine administrative tasks.

**Estimated Commitment – Additional Staff:**

- Year round: 15-20 hours per week (more prior to annual meeting)

We encourage creative approaches to address the duties described above.

**Information Required**

Proposals should include:

- Reasons Executive Director-Organization is interested in serving as the ARIA Executive Office.
- Description of the proposed host site including its relevance or relation to the field of insurance economics and risk management and what it has to offer ARIA in support of its development as an organization.
- Administrative capabilities to fulfill the scope of work and description of the proposed organizational structure (personnel) for the new ARIA executive office.
- Proposed financial relationship with ARIA and financial requirements to carry out the duties described above and any other duties mentioned in the proposal.
- Views on ARIA's direction for future growth
- Professional background of applicant for Executive Director
- Availability of resources including facilities, technology, staff experience and background
- Procedures to be used to fulfill duties, such as proposed staffing levels
- Three references

**Inquiries and Submissions**

Final Proposals are due by April 15, 2020. Please address inquiries and submissions to:

Richard Phillips, Former ARIA President , rphillips@gsu.edu