



# Request for Proposal (RFP)

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## Association Management Services for the Pennsylvania Orthopaedic Society (PA Ortho)

### About the Pennsylvania Orthopaedic Society

PA Ortho is dedicated to enabling Pennsylvania's orthopaedic surgeons to devote themselves to their chosen profession. Membership is the key to influencing and changing the practice of orthopaedic medicine; continued involvement will enable us to project a strong, unified voice.

PA Ortho maintains a robust web presence, a dedicated member portal, and actively communicates with members via email and online forums.

### Access

In conjunction with our lobbying firm, orthopaedic surgeons serving PA Ortho's legislative and political action committees provide all Pennsylvania orthopaedic surgeons with access to PA legislators and policymakers to effect positive change on orthopaedic practice.

### Representation

Orthopaedic surgeons across the state serve as advocates and are highly dedicated to ensuring quality patient care by serving as an orthopaedic medical information resource to the Pennsylvania Legislature, the Governor's office, and state regulatory agencies. PAOrtho is recognized as a credible source of information and data to decision makers in Harrisburg. The surveys and reports PAOrtho produces on orthopaedic practice patterns and the impact of skyrocketing liability insurance premiums on access to patient care are readily available to legislators and policymakers. Some examples include, the Physician Exodus and Malpractice Insurance Availability Survey, a workers' compensation practice expense study, and the Orthopaedic On-Call Coverage Survey.

### History of PA Orthopaedic Society

The Pennsylvania Orthopaedic Society (PAOrtho) is a prominent professional organization dedicated to enhancing musculoskeletal care through advocacy, education, and political action for orthopaedic surgeons in Pennsylvania. It has historically fought against high medical liability costs, advocating for tort reform and supporting orthopaedic practices, serving as a critical voice for orthopaedic surgeons in the state.

## Mission and Vision

### Mission

The Pennsylvania Orthopaedic Society exists to enhance our members' ability to provide the highest quality musculoskeletal care.

### Vision

The Pennsylvania Orthopaedic Society will be the primary organization that promotes quality musculoskeletal health for the citizens of Pennsylvania.

## Relationship to Other Organizations

Affiliated entities include PA Orthopaedic Society Political Action Committee (OrthoPAC) and Pennsylvania Orthopaedic Society Foundation.

## Types of Members

### Active

Doctor of medicine or osteopathy with a practice in the Commonwealth of Pennsylvania under a full and unrestricted license to so practice and have practiced within the Commonwealth of Pennsylvania for at least two years. Dues: \$500

### Associate

Associate membership shall be open to practicing orthopaedic surgeons who have formerly been Active members of the Society, and who no longer maintain a practice within the Commonwealth of Pennsylvania or orthopaedic surgeons who otherwise qualify for active membership status except for the completion of the two-year practice requirement in the Commonwealth of Pennsylvania. Dues: \$500

### Emeritus

Emeritus membership shall be open to Active members who have reached the age of sixty-five (65), or who have retired from the practice of orthopaedic surgery. Written application must be submitted to the Secretary of the Society. Granting of Emeritus membership shall be contingent on the recommendation of the Membership Committee and approval of the Board of Directors. Dues: \$25

### Advanced Practice Provider (APP)

Field of interest is related to orthopaedic medicine or surgery (physician assistant or physical therapist, nurse practitioner, orthopedic registered nurse certified, orthopaedic technologist). Dues: \$225

### Non-Orthopaedic Physician

Field of interest and expertise compliments the body of knowledge of Orthopaedics. Dues: \$500

## **Resident/Fellow**

All orthopaedic residents/fellows in the state of Pennsylvania are considered members of the Pennsylvania Orthopaedic Society. You must be a Doctor of Medicine or Osteopathy currently enrolled in an ACGME or AOA approved residency or fellowship program in orthopaedic surgery. No Dues

## **Description of Leadership Structure**

### **Management**

PA Ortho will adopt an integrated model of association management consisting of an Executive Director and an Association Management Company (AMC). The Executive Director will either be an independent contractor of PA Ortho reporting solely to the Board or a member of the operational support staff of the AMC responding to this RFP, both of whom have accountability to the Board. The desire is for the individual filling the Executive Director role be an industry expert.

The role of the Executive Director is to lead the organization through revenue generation, board administration, advocacy support, membership support and oversight of contractors and vendors.

*1: See Appendix for Executive Director job description.*

### **Leadership**

The Board of Directors consists of the President, First Vice President, Second Vice President, Immediate Past President, Secretary, Treasurer, Chairman of the Membership Committee, Chairman of the Bylaws Committee, Chairman of the Advocacy Committee, Chairman of the Education Committee, Chairman of the Political Action Committee, Chairman of the Young Surgeon Committee, Representative to the Pennsylvania Medical Society, Alternate Representative to the Pennsylvania Medical Society, the three (3) members of the Board of Councilors of the American Academy of Orthopaedic Surgeons, and three (3) members-at-large, one to be elected annually by the members to serve a term of three (3) years. In addition, there is a resident board position and resident committee position.

The standing committees consist of the Membership Committee, Nominating Committee, Bylaws Committee, Finance Committee, Political Action Committee (OrthoPAC), Advocacy Committee, Education Committee, and Young Surgeon Committee.

*2: See Appendix for Organizational Chart and Bylaws*

## **Description of Meetings**

PA Ortho's Annual Meeting CME program features top national speakers with sessions specifically designed to keep Pennsylvania orthopaedic surgeons at the top of their game. By hosting luncheons, dinners, and various social events, PA Ortho provides opportunities to network and socialize with colleagues throughout the state.

## Summary of Contracts

In addition to an association management company and an Executive Director, PA Ortho intends to maintain three independent contractor relationships. The Association utilizes a lobbying firm for advocacy, a meeting planner for the Annual Meeting (Scientific Meeting) and a promoter for sponsorship/exhibitors for the Annual Meeting. The Annual Meeting execution is covered through the 2027 meeting, but PAOrtho would be open to the AMC providing these services for the 2028 meeting.

## Proposal Submission Process

### Timeline:

- RFP Distribution: By April 1, 2026
- Proposal Deadline: April 30, 2026
- Finalist Presentations & Interviews: June 1, 2026 (PA Ortho Board Meeting)
- Selected AMC Notified: July 2026
- Transition Period Begins: December 2026
- Management Contract Start Date: January 1, 2027

### Submission Requirements:

#### 1. Company Overview

- Years in operation
- Number of employees
- Client portfolio
- References

#### 2. Response to Scope of Services

- Indicate ability to provide each service
- Identify services subcontracted

#### 3. Proposal Format

- Submit one digital copy (PDF)
- Submit printed proposals to Pennsylvania Orthopaedic Society, 1425 Crooked Hill Rd. Unit 60124, Harrisburg, PA 17106
- Send proposals to: Suzette Song, [info@paorthosociety.org](mailto:info@paorthosociety.org)

## Scope of Services

### **Operations & Administrative**

General Admin, day-to-day operations - emails, phone calls, member requests, general inquiries

Maintain organization's legal records, organizational records & minutes

Maintain and document Association best practices, policies, and process documentation

Ensure compliance with Association organizational documents and bylaws

Insurance administration

### **Board and Committee Support**

Board Meeting Administration – 1st, 2nd, and 3rd quarter

Registration, menu planning, board book development, field board member inquiries, post meeting follow up as required

Committee support including coordinating and participating in virtual evening meetings, communications, etc (8 committees, 2-3 meetings per year per committee)

Prepare and distribute materials, communications, etc

- Execute and/or facilitate Board actions and decisions
- Coordinate and participate in committee and Board meetings: take and provide notes and minutes
- Ensure adherence to by-laws governance
- Prepare and distribute materials, communications, etc.
- Ensure and enable timely follow-through of committee and Board responsibilities
- Identify resources

### **Membership Management**

Membership Renewal: invoicing/collections/follow up/delinquents/cancellations

New members: invoicing, onboarding, communications

### **Technology and Web Services**

Website updates

Maintain website member directory

Maintain membership database (Personify MemberClicks) – new member welcome notices, record updates

*3: See Appendix for Technology Assets*

### **Financial Management**

Process payables monthly

Prepare monthly financial statements & bank reconciliation

Banking - checks & deposits

Budget - analysis & preparation of new budgets

Audit/review and 990 filing, working with accountant

1099/1096 Independent Contractor filings

Maintain/update policies (check approval process, Investment policy)

### **Membership Communications**

Advocacy messages to membership as needed/call to action

Distribution of membership/education communications

### **Conference & Program Support**

Opioid Webinars – AAOS interface

Interface with Meeting Planner and Sponsor/Exhibitor Sales

Processing payments for exhibitors & attendees

Website Support for Meeting branding & marketing

Email support – provide lists for marketing purposes

*(with the possibility of taking on the full event management capabilities in the future)*

### **Grants Support**

Information gathering, grant application execution, and compliance monitoring and reporting

### **OrthoPAC Support**

Maintain financial statements, bank reconciliation, deposit checks, write PAC to PAC checks.

Maintain contribution history in membership database

File Campaign Finance reports and complying with financial requirements

File Lobbying Disclosure Statements

## **Additional Considerations**

Please address:

- Your capacity to support the strategic plan (under development)
- Membership recruitment and retention strategies
- Experience in conducting member surveys and assessments

## **Appendix**

- Executive Director job description
- Organizational Chart
- Bylaws
- Technology Assets
- Financial Statements / 990 (may be provided upon request)