



Request for Proposals (RFP) for Organizational Financial and Management Services

<p>RFP SUMMARY: MEBA seeks services contracted on an annual basis to support its financial administration and organization management, including core services such as membership management, accounting administration, event planning, as well as communications and marketing. Note the scope is divided into two sections denoting those services which are essential under this RFP (Items A.-D.), and those services for which MEBA invites separate, itemized proposals (Item E.).</p>	
RFP ISSUE DATE	March 3, 2026
PROPOSAL DUE DATE	March 20, 2026 11:59pm MDT
DEADLINE FOR QUESTIONS	The deadline for questions is March 19, 2026 at 11:59pm MDT Questions and/or inquiries must be submitted in writing to info@mteba.org .
PROPOSAL SUBMISSION PROCESS	Proposals should include 1) a brief cover letter describing your interest in this opportunity; 2) a description of services you would commit to provide if awarded; 3) a fixed price budget for proposed services. Please submit all proposal materials to info@mteba.org .

The Opportunity

About MEBA

Mission: Advocating for the planning and investment necessary to realize a reliable, affordable, and increasingly clean energy supply.

MEBA unites business and energy leaders to shape policies that sustain Montana's industries, strengthen communities, and deliver reliable, affordable energy to support economic growth.

MEBA is focused on harnessing Montana's exceptional energy resources to reclaim the state's role as a regional energy hub, enabling growth, attracting new industries, and reinforcing Montana's business-friendly economy.

MEBA is governed by a Board of Directors and operates as a nonprofit trade association.

Purpose of this RFP

MEBA is soliciting proposals from qualified firms or individuals to provide association management services as outlined below. As an all-volunteer-managed organization, MEBA is prepared to elevate the association through engagement with a professional and experienced firm or individual.

Association management services include membership management, financial management, conference and event management, and communications management.

Applicants must clearly identify their ability to provide advocacy and direct lobbying services as an optional add-on scope. These services must be clearly separated in both description and pricing.

Award Characteristics and Review Criteria

MEBA intends to enter into an annual fixed price contract not to exceed \$70,000 to be renewed annually contingent on MEBA's continued need for services and satisfactory performance of the contractor. Proposals will be evaluated on a combination of criteria to include budget, services offered, applicants' capabilities and related experience, and applicants' compatibility with MEBA and its mission.

Scope of Work

A. Association and Membership Management

- Serve as the primary administrative and operational lead.
- Implement Board-approved strategic priorities.
- Maintain an accurate membership database and related records.
- Develop and execute membership recruitment and retention strategies.
- Produce and distribute dues invoices and track payments.
- Support Board governance, including meeting coordination, agenda development, and preparation of minutes.
- Maintain official records and ensure continuity across leadership transitions.

B. Financial Management

- Maintain accurate financial records and accounting systems.
- Manage accounts payable and accounts receivable.
- Prepare monthly financial statements, including Profit and Loss, Balance Sheet, and Budget versus Actual reports.
- Assist with annual budgeting and financial forecasting.
- Ensure compliance with IRS requirements, including coordination and support for filing Form 990 and other required documents.
- Maintain appropriate internal financial controls and documentation.

C. Conference and Event Management

- Develop an annual event calendar and corresponding budgets.
- Manage venue contracts and sponsorship acquisition.
- Oversee registration systems and attendee communications.
- Coordinate speakers, panels, audiovisual needs, and logistics.
- Deliver post-event financial reconciliation and performance reporting.

D. Communications and Brand Management

- Develop and implement an annual communications strategy.
- Manage website updates and digital presence.
- Produce regular member communications, including newsletters and alerts.
- Draft press releases and assist with media engagement.
- Support development of annual reports and organizational impact summaries.

(Optional to be itemized in separate proposal - E. Advocacy and Lobbying Services)

- *Registered lobbying representation before the Montana Legislature.*
- *Development and execution of legislative strategy.*
- *Direct engagement with legislators and executive branch officials.*
- *Legislative tracking and reporting during legislative sessions.*
- *Filing required reports with the Montana Commissioner of Political Practices.*