



Canadian Society for Transfusion Medicine

Society Secretariat Services
Request for Proposal – Responses to Submitted Questions

The following is a consolidation of the questions received. Similar questions have been combined for efficiency.

1. Is this RFP being issued as part of your due diligence to evaluate your current Association Management Company (AMC) against the market, or is it your intent to switch AMCs?

Our intent is to evaluate all respondents and choose the one most suited to our needs.

2. What is the primary area of emphasis by the Society in terms of member benefits? What are the current challenges, successes?

As per our Vision Statements: To inspire and promote safe transfusion practices, to promote quality and provide guidance for hospital transfusion services, to facilitate opportunities for education and research in transfusion medicine and to cultivate regional, national, and international partnerships with key stakeholders.

In alignment with the vision and based on our work with the website redevelopment, CSTM includes a current focus to raise the visibility of the conference and standards while enhancing the accessibility of our events and resource pages.

3. Is CSTM a registered charity? Do you have a strategic plan?

CSTM is not a registered charity.

The Board of Directors undertakes regular cycles of strategic planning, and reports its activities to the membership.

4. Regarding general association management, please define traceability

Maintain files and documentation in a manner that it is accurate, unmodified, complete and retrievable



5. Please clarify the scope of bilingual service expectations (e.g., volume of French-language correspondence, member inquiries, reports)?

This requirement includes responding to general inquiries received from French speaking members, sponsors and contacts.

The CSTM provides translation for website content, communications and materials. Occasional support for materials or brief communications may be requested.

6. What platforms are currently used for file storage, communications (e.g., email, video conferencing), and internal collaboration? Are historical records and files readily available digitally?

We make use of several common platforms with current official records residing on a secured server. CSTM is open to utilizing appropriate, accessible and secure systems that are best supported by the respondent.

Records are digitally maintained and managed.

7. Please provide additional details about policies, procedures and board orientation.

Research and support for new and updated materials may be requested from time to time (refer to RFP item for *support for the Board of Directors*). CSTM develops and maintains policies as identified and as changes are required. Additional procedures and manuals are in place for the communications (including website and social media management) and conference committees. The Board orientation manual is currently under review and revision and orientation to individual roles is supported by the directors.

We welcome additional services that are already included as part of your service package, or details and separate items for our consideration. Please note that the focus of our decisions will be the scope of this RFP.

8. By member class or type, how many members do you have?

CSTM has approximately 350 members made up of individual and institutional members. Please refer to the CSTM website for the distinctions regarding membership types. Additional non-member contacts are captured for communications purposes.



9. Please provide additional details regarding membership growth and engagement requirements for member onboarding.

Membership over the past five years has been stable with attrition and new membership aligning with members leaving and joining the workforce.

In joining, members currently receive an automated confirmation welcome notice through the system and are subsequently granted access to resources (task performed by webmaster). Please see additional responses regarding upcoming changes in the membership platform that will result in changes in these functions.

There is no certification or examination process associated with CSTM, and no learning management system currently in use.

10. What database software do you currently use? Is consideration being given to moving away from this, or are you satisfied with its performance and usability? What is its current use?

While CSTM is currently supported with Wild Apricot, we are currently migrating to a new website platform (Wordpress) that will be leveraged with appropriate applications to support member management. Contacts includes other segments including non-member contacts, partners and industry.

Renewals are currently supported with annual email reminders (manual trigger); however, as above, this will be changing and is currently under development.

11. Are there any integrations with your CRM or donation platforms?

Our current CRM is being replaced with our website redevelopment. We anticipate that it will continue to be integrated with our member payment platform.

CSTM does not request nor take in donations.

12. How often does the Board meet, and how long is each meeting? Are the meetings in person, or are they held virtually?

The Board meets virtually ten times per year for one hour each. The Executive meets virtually once a month for 30 minutes. This is supplemented by two in person meetings; one coinciding with the conference. Meetings are conducted in English.

Meeting support is not provided for any of the CSTM Committees



13. What type of support is required for CSTM's standing committees? How many committees are there?

Outside of the executive committee (see separate response), this primarily includes maintaining provided records (minutes, reports, etc) and appropriate access to the same. Please also refer to general correspondence as it relates to occasional communications, and to the additional requirements for the Education Committee.

CSTM currently has eight committees, and several of these has sub-committee or working group activities.

14. Can you provide an estimated number of hours per month (or annually) for each major component of the scope (e.g., general administration, member support, board support, financial reporting, and event coordination)?

We expect the respondent to provide appropriate hours to meet the needs of the organization in alignment with the scope. Not excluding the details in the RFP, this includes:

Support for the Board of Directors (attend board meetings and take minutes; provide senior level advice in areas related to contracts, bylaws, etc)

Education Committee (manage event registration (4 per year) including reminders to registrants; distribute email marketing and confirmation of attendance; set up webinar and provide attendance reporting)

Annual Awards Committee (prepare and distribute results letters; provide payment; order and ship awards)

Financial Management (annual budgeting; accounts payable; annual returns; maintenance of not-for-profit status; reconciliations, investments, member payment support, coordinating of signing officers, conference support for sponsor/exhibitor payments; GST/HST/QST filings; supporting external audit/reviews; monthly reports to the Board

General Communications (distribution of 2-6 email communications per month (content or draft provided) including notification of and materials for the Annual General Meeting; responses and triaging for general inquiries that fluctuate throughout the year with member renewals and conference queries).

Please note that writing newsletters, website content and social media management are outside of the scope of this contract.



15. Is this a professional liability coverage provided to Individual members under a blanket policy, or is this directly for the Society?

This is for the Society.

16. Would there be an opportunity for us to submit a proposal for event management?

This is not part of the current scope and event management is considered at this time. We welcome additional services that are already included as part of your service package, or details and separate items for our consideration. Please note that the focus of our decisions will be the scope of this RFP.

17. Aside from the conference, how many events (webinars, workshops, etc.) does CSTM itself present over the course of a year?

CSTM plans and provides four virtual education sessions per year.

18. Regarding accounting services, does this include assisting the Treasurer in preparing an annual budget?

Yes, accounting services would include assisting the Treasurer with annual budget preparation for the society and the annual conference based on historical spend, pending contracts, and Treasurer knowledge of upcoming expenses.

19. Would you be able to share recent financial reports (e.g., last fiscal year's income statement and balance sheet) and details regarding the number of accounts, transactions and software?

These details can be further discussed during the interview phase, as appropriate. As and if these details are relevant to your proposal and/or impact on associated costs for service, please provide information for a range of services appropriate to the size of CSTM.

20. Does your organization undergo an annual financial audit or review engagement?

Yes, CSTM undergoes review engagement.



21. Could you provide an overview of your annual conference (number of attendees, format, duration)?

The annual conference draws between 250 – 500 attendees each year, varying with the location. For additional information on the scope and format of the conference, please review details from our recent St. John's Conference on our website. <https://www.transfusion.ca/Events/2025-CSTM-Conference-St-John-s/Scientific-Program>

22. Regarding event (conference) support, what types of contracts are anticipated?

Going forward, the conference related RFP and contract negotiation will be completed by Conference Coordinator.

23. Is the management of existing sponsor relationships and development of new relationships part of the scope of work?

No, CSTM structures already include a dedicated sponsorship delegate.

24. Do conference related responsibilities include exhibit sales and coordination or does CSTM have a current vendor in place? Are you looking to move away from your current conference platform?

CSTM has a conference coordinator and sponsorship delegate for this work. At this time, moving away from the use of Dryfta is not part of the RFP; however, we welcome additional services that are already included as part of your service package, or details and separate items for our consideration. Please note that the focus of our decisions will be the scope of this RFP

25. Regarding optional event support, how many events / days per year?

This item related to the annual conference. Onsite / live support is not part of the core proposal requirements and, should this be something a vendor provides, we would look forward to reviewing the proposal as a separate consideration.

26. Will there be a handover period or overlap with the current service provider?

The project timeline is designed to include a handover period.



27. Would storage of any physical materials be required?

At this time expected management of physical materials include a small volume of marketing materials (exhibit table cloth, vertical banner, pens, etc)

28. Does CSTM have an anticipated budget or range for these services?

CSTM will review each response, including the proposed budget, to arrive at its decision.

29. What are the key criteria and weighting that will be used to evaluate proposals?

Key criteria are aligned with the outlined scope of services and requirements for the proposals outlined in the RFP. The decision will be based on vendor response to this RFP, and the results of a subsequent interview for select respondents.

30. How many references are you looking for?

A minimum of two references is required.