



## **Independent Contractor Search Request for Applications**

The [Planned Giving Forum of Greater Sacramento](#) (“PGFGS” or the “Client”) is a professional organization that provides educational opportunities and resources for planned giving professionals; promotes planned giving as an effective philanthropic option for donors; and offers a networking system for practitioners and professional advisors.

PGFGS is seeking a contractor (“Contractor” or “Administrator”) to provide services in the capacity of an Administrator. The Administrator supports the activities and programs of the chapter and answers to the executive committee of the board. The Administrator should be familiar with and supportive of the mission and goals of PGFGS.

The initial contract is expected to begin **on April 8, 2021 for one year with the opportunity for renewal.** Application should reflect a complete contract amount that is consistent with the scope of work and associated hours detailed below.

### **Scope of Work:**

**Total number of monthly hours: approximately 10-15**

#### **Administrative services**

- Transport supplies to monthly in-person meetings and save electronic records in the PGFGS shared drive. Purchase supplies as needed for chapter activities.
- Respond to general chapter tasks as assigned by the President or representative assigned by the President.
- Provide administrative support for board meetings by taking and preparing minutes.
- Provide web services for event updates, notices, and other communications to be posted on the chapter’s website.
- Create forms and establish procedures as required.

*Administrative services are contracted for approximately 2 hours per month.*

#### **Chapter programs**

- Work with Marketing to create program announcements and all other electronic communications.
- Set up e-mail schedule for monthly programs and activity notices, including program reminders and post-program surveys.
- Manage accounts payable process for events and activities, including preparing and sending invoices as needed, collecting funds, and entering credit card payments as needed.

- Provide event registration services and items, including registration check-in lists, waitlists, and name tags.
- Create event logistics/arrangements: Provide updates to the Programs chair so they may plan room set-up accordingly.

*Chapter program services are contracted for approximately 4-6 hours per month.*

### **Communications**

- Send e-mail alerts for member notices and special events.
- Update chapter website as needed.
- Respond to chapter inquiries by directing people to appropriate resources.
- On-going communication with Board President, Board Members, and Committee Chairs.
- Serve as administrator for social media accounts, such as LinkedIn and YouTube.

*Communication services are contracted for approximately 2-4 hours per month.*

### **Database**

- Maintain chapter database and chapter membership roster.
- Code or segment data into various constituency groups (member, prospect, PGFGS member, PGFGS prospect, etc.).
- Work with membership committee and International Headquarters regarding database requests, inquiries and reports.
- Post membership roster on members-only page of website and update at the end of each quarter.

### **Employment and support**

The Administrator is an independent contractor, not Client's employee. Contractor's employees or subcontractors are not Client's employees. Contractor and Client agree to the following rights consistent with an independent contractor relationship.

- Contractor has the right to perform services for others during the term of this Agreement.
- Contractor has the sole right to control and direct the means, manner and method by which the services required by this Agreement will be performed in accordance with existing systems.
- Contractor has the right to hire assistants as subcontractors, or to use employees to provide the services required by this Agreement.
- The Contractor or Contractor's employees or subcontractors shall perform the services required by this Agreement; Client shall not hire, supervise or pay any assistants to help Contractor.
- Neither Contractor nor Contractor's employees or subcontractors shall receive any training from Client in the skills necessary to perform the services required by this Agreement.
- Client shall not require Contractor or Contractor's employees or subcontractors to devote full time to performing the services required by this Agreement.
- Neither Contractor nor Contractor's subcontractors are eligible to participate in any employee

pension, health, vacation pay, sick pay or other fringe benefit plan of Client, nor is Contractor eligible for worker's compensation insurance through the Client.

Contractor shall pay all income taxes and FICA incurred while performing services under this Agreement. Client will not:

- Withhold FICA from Contractor's payment or make FICA payments on Contractor's behalf.
- Make state or federal unemployment compensation contributions on Contractor's behalf.
- Withhold state or federal income tax from Contractor's payments.

### **Application Format**

Please address the following topics:

- Firm Identification – State the full name and address for you or your organization. Indicate whether you operate as an individual, partnership, or corporation.
- Capability – Provide your qualifications and resume.
- Responsiveness – Discuss how you will respond on a day-to-day basis to chapter needs.
- Cost of Services and Compensation – Please describe your proposed method of compensation including hourly rate, preferred billing method, and payment requirements. This position will pay approximately \$35-40/hour
- Experience and References – Based on your understanding of the proposed scope of services, include a list of relative projects in which you have been involved. For each of these projects please include client name, contact information, and services provided.

**Applications are due and must be received via e-mail no later than March 31, 2021 . Please e-mail to:**

**Becky Thompson, Vice President  
Planned Giving Forum of Greater Sacramento  
thompsrm@sutterhealth.org**