

Request for Proposals

**Association Management Services for
American Coaster Enthusiasts Worldwide, Inc.**

June 1, 2026

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1. PURPOSE

American Coaster Enthusiasts Worldwide, Inc. (ACE) requests proposals from qualified and experienced individuals and firms (Contractor) to provide association management support services for its organization and members. The Contractor or Contractors shall be responsible for membership support, event registration, and financial management of ACE's operations. Founded in 1978, ACE is a non-profit, volunteer-run organization dedicated to the preservation, promotion, appreciation and safe enjoyment of roller coasters. With more than 7,000 members across the U.S., Europe, Asia and South America, ACE is the largest amusement park enthusiast organization in the world.

The Contractor plays a pivotal role in partnering with ACE to provide a variety of support services. ACE is seeking a Contractor who can help ACE continue its success in delivering high-quality service, improving its product, and attracting new members while working efficiently and maintaining expenses and costs at a low level. ACE is a dynamic and evolving organization, so its management partner needs to be prepared for changes and improvements to better support ACE members.

2. BACKGROUND INFORMATION

A. Mission Statement

The mission of American Coaster Enthusiasts is to foster and promote the conservation, appreciation, knowledge, and enjoyment of the classic wooden roller coaster and the contemporary steel roller coaster; create fellowship among its members; and promote the continued operation of roller coasters.

B. Association Profile

Name:	American Coaster Enthusiasts Worldwide, Inc.
Acronym:	ACE
Year established:	1978
IRS Classification:	501(c)(3)
State of Incorporation:	Delaware
Membership:	International, approximately 7,100 members mostly in the U.S.
Website:	ridewithace.com

C. Executive Committee

ACE has five elected officers: President, Past President, Vice President, Secretary and Treasurer; and seven appointed directors: Membership Director, Communications Director, Publications Director, History and Preservation Director, Region Director, Events Director, and Operations Director. Officers are elected for two-year terms and may serve for two consecutive terms. There are no term limits for directors, but directors are reappointed every two years following the election. ACE's structure is governed by a Constitution and Bylaws.

The ACE Executive Committee meets in person three times a year (late winter, June and early fall) and manages the club day-to-day through email and telephone correspondence.

D. Regional Representatives

ACE has 18 US regions and four international regions. Regional representatives and assistants are appointed for each region. The representatives and assistants oversee a particular region and manage local services, events and newsletters for ACE members in that region.

E. Insurance

ACE holds a director and officer liability policy with a current aggregate limit of \$1,000,000 per year. Additionally, there is general liability insurance for ACE's archives collection.

F. Membership Information

1. ACE offers several membership types, including individual, couple, family of three or more members at the same address, corporate, and honorary. Multi-year memberships of two and three years are available at a discount.
2. Membership expiration dates are relative to when members join ACE.
3. Members abide by the ACE Code of Conduct and violators are subject to suspension or membership termination by the Disciplinary Committee.

G. Events

In a typical year, ACE holds three to five national and international events:

1. Spring Conference - April/May
2. Coaster Con (annual convention) – June (week beginning on Father's Day)
3. Summer Conference - Aug/Sept (not every year)
4. Preservation Conference – date will vary
5. Fall Conference - Oct/Nov (held occasionally)
6. Special and International events (approximately one every year to three years)

The names, dates and types of national and international events are subject to change, but there generally will be an average of five annually. Additionally, ACE hosts up to 100 more regional events that are operated independently by the regional representatives and parks. The Contractor is only responsible for managing the registration for the national and international events.

H. Financial and Accounting Services

ACE's fiscal year is from January 1 to December 31. The Contractor provides monthly financial statements, including balance sheet, monthly check history, monthly statement of activities, and monthly year-to-date general ledger detail report. The statement of activities report includes period-to-date and year-to-date comparisons of current year, prior year, budget, and variance amounts. The Executive Committee provides the annual budget. ACE contracts with outside firms to handle annual Form 990 tax return filings and biennial election processing. The Contractor supports these efforts by providing financial and membership information as applicable.

I. Banking and Investment

ACE currently has six separate bank accounts (two checking, two savings, and separate accounts for the Archives and Preservation funds) held at two banks. There is also a PayPal account and four investment accounts. Checking account banking and most banking transactions are handled by the Contractor. ACE works with an investment manager and brokerage company to handle long-term investments. ACE maintains a credit card merchant account and has two corporate credit cards with multiple authorized users.

J. Publications

ACE annually publishes four issues of *RollerCoaster!*, a full-color magazine. ACE also publishes books from time to time. The Contractor processes expenses and deposits related to publications, produces address files for the mailings, and occasionally is asked to mail out a copy of the magazine or newsletter when a member does not receive it. Otherwise, ACE publications are managed by volunteers and outside vendors.

K. Merchandise

ACE provides merchandise for sale to members via the ACE General Store. Merchandise can be purchased online or at events. Merchandise procurement and distribution is contracted separately to an outside vendor and is not part of the Contractor's duties; however, the Contractor does handle

processing of deposits and expenses, as well as accounting of the inventory and assets, as provided and directed by the merchandise director.

L. Archive Facility and Office

ACE maintains an archive storage facility and office in Quakertown, Pennsylvania, and also has large archival items stored at facilities elsewhere, including Hatfield, Pennsylvania and Plainview, Texas. The Contractor processes expenses related to the archive facility.

M. National Roller Coaster Museum and Archives (NRCMA)

ACE is affiliated with the NRCMA and collects donations on its behalf. The Contractor processes the donations received through ACE and disburses them quarterly to the NRCMA.

N. Websites

ACE maintains a significant presence on the Internet. The websites are a portal to prospective members as well as a resource for current members. The websites include information about ACE, membership, events, and news. There is also a member-only section that allows access to the membership directory and the ability to check one's membership status. The websites are designed, developed and maintained by volunteers.

The Contractor supplies some of the data and information used on the sites, including updated membership files or an application programming interface (API) for synchronizing membership database changes to the website, and is responsible for maintaining an online membership system and creating event registration pages for ACE Flagship events. The Contractor also processes expenses related to the websites.

3. SCOPE OF SERVICES

A. Overview

The Contractor shall be guided in the performance of its responsibilities by the fact that the contract delegates to it a public function that it performs as the representative of ACE. The Contractor shall be responsible for providing and managing the services, functions, and resources as directed by ACE related to:

1. Membership Support
2. Event Registration
3. Financial Management

B. Membership Support

ACE is an organization predominantly supported by members and their annual dues. At present, ACE has approximately 7,100 active members in 4,400 membership units, with 200 to 400 membership units up for renewal each month.

The Contractor shall provide services to help ACE attract and retain members, including:

1. Process mailed and online member applications and renewals. Applications and renewals must be processed within ten business days. Credit card, check or money order payment processing for new and renewing memberships is required. Memberships and corresponding dues income must be segregated and tracked by type of membership.
2. Provide membership cards and welcome packets. Welcome packets normally include a welcome letter, membership card, copies of ACE's code of conduct, and the most recent issue of *RollerCoaster!*

3. Manage the system that produces and emails renewal notices approximately 180 days before membership expiration dates and then again at 30 days before expiration dates for members that have not already renewed. Produce and send printed membership renewal notices approximately 30 days before the membership expiration date, only if the member has requested a paper renewal form.
4. Maintain membership database (member information, join date, dues renewal date, type of membership, etc.). Any changes to the policies or procedures of maintaining the membership database must be approved by ACE's operations director and/or membership director..
5. Provide membership data access to individuals approved by ACE's president.
6. Provide membership database updates to ACE to synchronize changes with the databases on ACE's website daily. Database updates from the Contractor to the website will be via files or an API in a mutually agreed-upon format. ACE is responsible for loading the updates into the ACE website databases.
7. Process member requests to update contact information. These requests may be submitted by postal mail and online.
8. Maintain records of paper membership transactions for a period of four years.
9. Provide ACE's mailing services with an electronic file of addresses for national mailings of ACE publications or other communications. ACE currently sends four publication mailings at the periodical rate. The file must be in a mutually agreed-upon format. The timing for production of the address files can vary depending on the publication mailing schedule.
10. Handle returned mail, investigate the return, contact the member if necessary and make the appropriate corrections to the database.
11. Process requests for replacement of lost or damaged membership cards. This will include processing the payment, producing a new membership card and distributing the new card.

C. Event Registration Support

ACE events are highly regarded and are one of the main benefits of being a member of ACE. Flagship (national) events are planned and organized by the events director, the events committee, and regional representative teams. They can draw anywhere from a few hundred to more than 1,000 registered attendees at three to five annual events, which typically take place between May and September.

The Contractor shall provide support to the national and international events by handling registration tasks, including:

1. Create a web page for handling online event registration and payment and review online registrations for completeness and correct payment.
2. Process online event registrations and payments (credit cards or PayPal). Processing registrations by phone is occasionally required.
3. Process registration cancellations based on policy and requirements provided by ACE. Inform the registration director of cancellations before the event.
4. Process refunds for event registration payments as directed by the registration manager or president.
5. Provide a means to implement comped and discounted registrations and, at the direction of the president or registration director, notify members of their eligibility for comped or discounted registration.
6. Verify registration information for event attendees via email.
7. Provide a method for the registration manager to monitor event pre-registration on a daily basis.
8. Provide spreadsheets of pre-registered event attendees' information, including first name, last name, city and state, member number, phone number, email, type of registration (member, non-member, member under 12, non-member under 12, comped/discounted, season pass, etc.), and amount paid, if requested.

9. Provide Excel spreadsheets of event volunteer information (names, phone numbers, email addresses, and time slots) if requested.

D. Financial Management

Most of the services that ACE provides, including the membership support and event registration provided by the Contractor, require “back office” financial and accounting support by the Contractor. The duties and tasks performed by the Contractor shall include:

1. Process invoices and expense statements, prepare accounts payable checks, and record using appropriate ACE general ledger codes.
2. Process check and credit card payments for memberships, event registrations, donations, auction proceeds, and publication orders. Follow up on denied credit cards, check payments and insufficient payments.
3. Maintain checking account register(s), record deposits, and reconcile bank statements.
4. Maintain financial statements (accrual basis) and provide monthly copies of financials to the treasurer and the president.
5. Provide a financial accounting of registrations after each national and international event (including advance registration and late registrations) to the ACE registration manager and treasurer.
6. Keep a monthly record of merchandise and publication inventories and cost of goods sold provided by the appropriate ACE director or manager.
7. Generate various accounting reports at the request of the president or treasurer.
8. Manage ACE bank accounts (currently six), including maintaining a list of all accounts, routing numbers, bank contact names and phone numbers, and minimum balance requirements; ensuring bank signature cards reflect current ACE officers; and maintaining a list of CDs and other investments with their maturity dates.
9. Support the preparation of the federal tax return (IRS Form 990) annually by providing financial data and information to the accountant and handling any IRS correspondence with the ACE treasurer and accountant.
10. Send W9s to new vendors before initial payment.
11. Issue IRS Form 1099s as appropriate.
12. Process income, issue payments, and process refunds in foreign currency (wire transfers) as may be required for an international trip or a “national” event held in Canada or Mexico. Approximately 25 wire transfers are initiated every two or three years for international trips.
13. Process and record donations for ACE’s special funds (Archives, Preservation, and NRCMA), including auction proceeds from national and regional events and donations included on member applications and renewals.

E. General Office

To provide administrative support to ACE activities, the Contractor shall:

1. Maintain a phone, answer phone saying “American Coaster Enthusiasts” and provide member service during Contractor’s normal business hours. At a minimum, hours of live phone service should be 10:00 a.m. to 4:00 p.m. local time.
2. Provide a voicemail system with a recorded message for after-hours coverage.
3. Respond to emails addressed to info@aceonline.org, membership@aceonline.org, and registration@aceonline.org.
4. Have the ability to electronically transfer data to ACE officers and designated volunteers.
5. Comply with the Payment Card Industry Data Security Standard (PCI Standard) for storing and protecting credit card information. The Contractor is responsible for 100% of direct and

consequential costs associated with any compromised credit card information stored by the Contractor.

6. Maintain electronic backups of financial records and other important files with off-site storage.

F. ACE Records

1. All records remain the property of ACE.
2. The Contractor shall provide secure storage for ACE's membership, event registration, and financial records going back 10 years.
3. ACE's membership records and financial data are confidential. The Contractor shall exercise reasonable precautions to prevent the disclosure of confidential information to anyone except the officers, employees and agents of the Contractor or ACE. Information may only be divulged to third parties, such as during an audit or for tax report preparation, with the written consent or direction of ACE's president or treasurer.
4. All records, files, databases, documents, spreadsheets, and other materials prepared, or in the process of being prepared, for the services to be performed by the Contractor shall be and are the property of ACE. ACE shall be entitled to copies and access to these materials during the progress of work. Any such materials remaining in the hands of the Contractor or in the hands of any subcontractor upon completion or termination of the work shall be immediately delivered to ACE.

G. Software Requirements

The Contractor shall supply certain software and systems, or their equivalent, to provide and manage the services, functions, and resources of this scope. Software currently used includes:

- Membership database: YourMembership.com (licensed through current management contractor)
- Event registration processing: YourMembership.com (licensed through the current management contractor) and HigherLogic.com
- Bookkeeping: QuickBooks
- Microsoft Office 365 (Word, Excel, Access)

The Contractor should contact ACE with questions about using other software environments. ACE does not require continued use of these software environments, but the Contractor must provide a plan to import or migrate current and historic data to any new proposed software or systems, including any costs associated with that transition, to allow seamless transition and continuity of records. The Contractor shall use currently supported versions of software or systems.

H. Services Not Included in the Scope

ACE has an extensive volunteer network to provide many services. As a result, the following activities are not included in this Scope of Services, but shall be provided by ACE or its other vendors and contractors:

1. Event planning and on-site check-in.
2. Publications management, design, layout, printing and distribution.
3. Merchandise management, procurement, sales and distribution.
4. Website design, development, maintenance and hosting.

4. CONTRACTUAL INFORMATION

A. Contract Term and Termination

1. The selected Contractor will be required to execute a contract for services with ACE, describing the Scope of Services to be performed, compensation, and other pertinent provisions and requirements.
2. The contract term shall commence on the effective date and expire three years from the service start date (anticipated to be July 1, 2027). The three-year contract period only begins once service has been assumed from the previous contract and does not include any mobilization period, if needed.
3. The contract will automatically renew annually, with the same terms and conditions, unless notice of termination is given 150 days before the end of the initial or renewal term. Longer or shorter contract or extension terms may be negotiated upon mutual agreement of both parties.
4. Given the necessity of ensuring continuity of services to ACE members, ACE also reserves the right to extend the base or renewal terms of the contract up to six consecutive one-month periods with the same terms and conditions contained in this contract. ACE will notify the Contractor in writing of ACE's intent to exercise each one-month extension term at least 30 days before the particular month is to begin.
5. Either the Contractor or ACE may terminate the contract with a 150-day written notice given to the other party.
6. Notwithstanding any other provision of the contract, ACE may terminate the contract for cause with 30-day notice upon the occurrence of a material breach of the contract, which shall include, but not be limited to Contractor's insolvency or inability to meet its obligations; misrepresentation or conduct that reflects adversely on ACE or its reputation; failure to comply with a valid and applicable law, ordinance, rule, or regulation; failure or refusal, after due notice by ACE, to comply with the contract terms or perform services called for by the contract; or contract assignment or subcontracting of primary obligations without prior written permission of ACE.
7. If the Contractor ceases operation before the termination date based on the contract notification period, ACE will be absolved of any financial obligations for payment and will be free to negotiate service with Contractor's former employees without penalty.

B. Compensation

1. ACE would prefer a fixed monthly fee for services, not including expenses. The fee shall be fixed for the first three years of the agreement following the service start date.
2. Management fees will be invoiced monthly.
3. Reimbursable expenses will be invoiced monthly. Expenses incurred, such as postage, shipping, printing, and approved travel to ACE meetings, will be reimbursed at direct cost. Reimbursable expenses must be reasonable, verifiable, and adequately documented to ACE's satisfaction.
4. No later than 30 calendar days following receipt of the Contractor's properly documented invoice for services performed during the prior month, ACE shall pay the Contractor for approved expenses and fees.
5. Approval of expenses, fees, and invoices will be given by ACE's president or appointed designees.
6. If the Contractor has proposed, and ACE has agreed to, any mobilization or transition expenses associated with starting the contract and service, expenses shall be invoiced at the end of the mobilization period. All other provisions of this compensation section regarding reimbursable expenses, 30-day payment, properly documented invoices, and approval of expenses apply to the payment of any mobilization invoice.

7. For any renewal periods beyond the initial three-year term, if either party wishes to change compensation from the established amount, such compensation shall be mutually agreed to by both parties.

C. Insurance Requirements

The Contractor shall provide general liability and errors and omissions insurance certificates that are satisfactory to ACE.

D. Responsibilities upon Completion, Reprocurement, or Termination of Contract

If the Contractor is not selected or designated as the ACE contractor beyond the term of this contract or the contract is terminated, the Contractor shall be obligated to carry out such contract transition and termination activities as may be required by ACE to preserve and protect operational integrity and to help effect a smooth transition to the successor.

5. SOLICITATION PROCESS AND PROPOSAL EVALUATION

A. Timeline

ACE intends to adhere to the following timeline, but it is subject to change at its discretion:

- | | |
|--|---------------------|
| 1. RFP Issued | June 3, 2026 |
| 2. Requests for Clarifications/Questions Due | August 5, 2026 |
| 3. Response to Clarifications/Questions Provided | August 14, 2026 |
| 4. Proposals Due | August 30, 2026 |
| 5. Interviews, if needed | early October, 2026 |
| 6. Contract Award/Effective Date of Contract (tentative) | November 1, 2026 |
| 7. Mobilization and Transition (tentative) | April 1, 2027 |
| 8. Service Date (tentative) | July 1, 2027 |

B. Submission of Questions and Requests for Clarifications

Any questions or requests for clarification regarding this RFP shall be emailed to Elizabeth Ringas, President, at rfp@aceonline.org for receipt no later than August 5, 2026. ACE's reply to questions and requests for clarification will be provided no later than August 14, 2026. Responses and additional supporting documents to assist in proposal preparation (policies and procedures, recent financial information, etc.) will be available online at <http://www.ridewithace.com/rfp2026>.

C. Proposer's Qualifications and Experience

1. Company Qualifications, Experience and References

In order to be considered for selection for award of a contract, each Proposer must provide information about itself so that ACE can evaluate the Proposer's ability to support the commitments outlined in response to this RFP. Each Proposer must possess sufficient resources and capability to support and enable the services to be performed and to complete the contract satisfactorily. Client experience with a nonprofit organization should be identified in the proposal, if applicable. If a Proposer has joint partners, the lead must be designated, and the organizational arrangement and roles and responsibilities must be described.

2. Qualifications and Experience of Key Personnel

Information should be provided to indicate sufficient evidence satisfactory to ACE that the proposed key personnel have the skills, qualifications, and experience to successfully provide the Scope of Services. Key personnel should have previous experience in similar work.

3. Use of Subcontractors

Work that subcontractors will perform, if any, should be indicated and the qualifications of such will be considered as part of the evaluation process.

D. Evaluation of Proposals and Selection Process

1. Evaluation Committee and Criteria

An evaluation committee, which may include members of ACE's Executive Committee and outside experts, will review and screen the proposals submitted. Proposals will be evaluated based on criteria which may include reasonableness of proposed costs, qualifications and experience of Proposer and key personnel, plans to provide the required support services, and responsiveness to the Scope of Services. While cost is one of the primary criteria, as ACE is a nonprofit organization and must keep its costs low, ACE also desires to obtain services that provide the greatest value. The lowest proposed cost will not necessarily be chosen first, but if a proposal is not competitive cost-wise, it likely will not be chosen either.

2. Interviews

Following the initial review and screening of proposals, one or more Proposers may be invited to participate in an oral interview. If ACE conducts interviews, they are tentatively scheduled for mid-October, and will be conducted via conference call and online presentation. These dates are subject to change. Attendees at an interview should include those individuals who will have direct involvement with the provision of the services. ACE reserves the right to record all interviews or presentations unless both parties have agreed otherwise.

3. Revised Proposals, Negotiations and Contract Award

ACE reserves the right to request revised proposals, to negotiate with any individual or qualified firm, or to interview or not if, in ACE's judgment, it is in ACE's best interest to do so. ACE may accept a proposal or negotiate the terms and conditions of a contract. All Proposers will be notified of the recommended contract award.

4. ACE Rights

ACE reserves the right to cancel the RFP in whole or in part, at its sole discretion, at any time before the contract is fully executed and approved on behalf of ACE. This RFP does not commit ACE to award a contract, to pay any costs incurred in the preparation of the proposal for this request, or to procure or contract for services. ACE reserves the right to modify or cancel in whole or in part this RFP, to reject any and all proposals, and to accept the proposal it considers most favorable to ACE's interest in its sole and unlimited discretion.

5. Confidentiality

ACE shall hold the information contained in responses to this RFP in strict confidence and shall use the information only for purposes of selecting a Proposer and awarding a contract. Proposers should not disclose proprietary or confidential information.

6. PROPOSAL CONTENT AND SUBMISSION

A. Proposal Requirements

While ACE prefers to have a proposal that can and will provide all aspects of the Scope of Services by a single provider, individual Proposers can submit a proposal on any and all portions of the scope in conjunction with other Proposers to provide all aspects of the Scope of Services. ACE reserves the right to consider any proposals received.

Proposals shall consist of a technical proposal and a cost proposal. The following information must be included in the proposal or accompanying materials:

