



## **Seeking Proposals for Professional Association Management Services From Qualified Individuals and Firms**

### **A. Requirements**

The Advancement Network (“AdNet”) is seeking proposals from qualified individuals and firms for the provision of professional association management services. The following Request for Proposals (RFP) describes the areas of expertise that are sought in support of ADNet meetings, activities, and administrative tasks.

AdNet seeks to establish a contract with an individual or firm that is experienced in providing professional association management services. The AdNet Board will conduct an evaluation of submitted proposals and will award a contract to the individual or firm whose proposal is determined to be most advantageous to AdNet considering the evaluation factors set forth in this RFP.

### **B. Term of Contract**

The initial contract resulting from the RFP will be effective after approval by the AdNet Board to start on an agreed upon date for a period not to exceed three (3) years, with annual renewal contingent upon contractual requirements being satisfied based on a mid-year review and an end-of-year review by AdNet’s Executive Committee. Adnet will determine when and if it will be appropriate to issue a new RFP for management services or to renew for a successive contract.

### **B. Background Information**

The Advancement Network (“AdNet”) is a networking and personal development resource for community foundation professionals serving in fund development, philanthropic advising and donor services roles. For its members, AdNet provides professional development webinars, access to a robust Membership Directory and online peer learning exchange, an annual conference, and multiple opportunities to build leadership skills through Board service and volunteering. See the final page of this RFP for AdNet’s Mission, Vision and Values statements, or visit <https://adnetcf.org> for more information.

### **C. Scope of Contracted Work**

The following information, provided to prospective individuals and firms, describes AdNet’s expectations of the awarded contractor’s responsibilities, as they relate to providing professional association management services to AdNet. The selected contractor will report directly to the AdNet President and its Board of Directors and will have overall strategic and operational responsibility for AdNet’s core programs and execution of its mission. The essential duties and responsibilities include, but are not limited to:

### ***Meeting and Conference Support***

- Assist in the Interview and hiring process for vendor to manage AdNet's annual Conference held in selected cities nationally.
- Support the planning and coordination of the conference in partnership with the Board, conference committees and the selected conference planning vendor.
- Steward existing sponsors, ensure recognition benefits and draft correspondence, proposals, etc.
- Foster relationships with other partners, who may include but are not limited to ComMA, ProNet, CEONet, and the Council on Foundations.
- Provide reports and prepare materials for virtual (monthly) Board meetings as requested.
- Support the planning and execution of monthly Board meetings and annual Board planning retreat, including the preparation of meeting agendas, reports and minutes.

### ***Membership Support***

- Keep the membership database updated and current.
- Provide monthly reports of membership and other lists as requested by AdNet leadership or committee chairs.
- Regularly manage updates to membership database and email marketing lists.
- Support the planning and coordination of ongoing member education, including online programming (webinars and other forums).
- Assist with member stewardship, including but not limited to onboarding of new members, sending welcome messages, dedicated messages for renewal, etc.
- Analyze existing membership and assist with recruitment efforts targeting underrepresented regions and demographics.

### ***Technology, Social Media and Publications Support***

- Manage the AdNet website, recommending to the Communications Committee and/or the Board platform upgrades or updates that enhance the member experience.
- Maintain and/or implement upgrades or updates with committee approval.
- Manage the member portal.
- Manage the production and distribution of monthly newsletter.
- Lead the communications effort (social media, e-blasts, newsletter, publications, etc.) with guidance from Communications Committee.

### ***Financial Support***

- Manage AdNet's finances in collaboration with the Board Treasurer and Board, maintaining current all financial data using relevant software.
- Provide financial reports as requested by Treasurer and Board.
- Complete required reports to comply with State and IRS regulations.
- Develop and monitor annual budget with guidance from Board.

### ***General Support***

- Ensure ongoing programmatic excellence, and consistent quality and accuracy of financial reports, communications, membership database, and other systems.

- Create and manage master organization calendar.
- Actively engage and energize AdNet volunteers, board members, event committees, alumni, partnering organizations, and sponsors.
- Prepare and send out electronic correspondence (emails, announcements, etc.) at the direction of (or in the absence of) AdNet leadership and committee chairs.

#### **D. Response Format & Proposal Instructions**

Responses must include the following information that will serve as the basis for rating demonstrated qualifications of the individual/firm in this RFP. In the review process, AdNet will evaluate proposals based upon the following information that must be submitted in each response:

##### 1. Executive Summary

- Condense and highlight the contents of the proposal. The summary should provide the AdNet Board with an overall understanding of the proposal and the individual or firm's approach.

2. Evidence of the individual or firm's ability to provide association management services, including company background and history.

3. Individuals or firms must address the following requests:

- Identify how you will manage, service and support AdNet.
- Describe your individual/firm's experience with similar clients/associations, including approximate budget level.
- Present a detailed process for your services and how those components will benefit AdNet.

4. An outline of the individual or firm's credentials and the professional experience of individual staff members intended to provide services based on an awarded contract — positions held, past clients, etc. Individuals/firms should include resumes or other descriptions of relevant experience and qualifications of key individuals who will work with AdNet. While AdNet does not limit the individual or firm's ability to assign or reassign personnel during the period of contract performance, the experience, qualifications, and education of the key individuals are expected to represent a contractual commitment by the individual or firm to retain comparably skilled and qualified individuals during the contract.

5. Individuals or firms must provide references (including relevant contact information) from organizations for which you have provided support.

6. Fee Structure

- Detail the fees associated with providing the detailed Scope of Contracted Work and any additional costs associated with fulfilling this RFP.

7. Individuals or firms may also provide any additional information that may be germane to the proposal and the evaluation of the individual or firm's experience.

## **E. Submission and General Instructions**

Individuals and firms responding to this announcement shall submit their proposal by email to AdNet President Phillip Lanham ([phillip.lanham@gcfdn.org](mailto:phillip.lanham@gcfdn.org)) and Vice President Janell Kaplan ([jkaplan@miamicomunityfoundation.org](mailto:jkaplan@miamicomunityfoundation.org)) by May 7, 2021. Late proposals will not be accepted.

## **F. Important Dates**

1. RFP Notice – Open for Submission March 19, 2021
2. Proposal Submission Deadline May 7, 2021
3. AdNet Board Review and Interviews June 1, 2021
4. Approval by AdNet Board of Directors and Contract with Selected Proposal July 1, 2021

All proposals should be submitted as a PDF document. Submitted proposals should not exceed 10 printed pages in length in their entirety, inclusive of appendices and other reference material, but not including individual resumes.

## **G. Evaluation and Selection Process**

The AdNet Board will evaluate the merits of proposals received in accordance with the evaluation factors stated in this RFP and will identify the proposal that is most advantageous to AdNet. The strengths and weaknesses of proposals will be ranked and evaluated based on the following criteria:

- Demonstrated experience in association management
- Demonstrated capacity to assist in administrative tasks
- Ability to provide support for association activities
- Ability to assist with financial reporting and documentation
- Pricing
- Individual or firm's experience, qualifications, and key personnel, and the extent to which the qualifications, experience, and past performance are likely to foster AdNet's success.

Proposals that are incomplete in terms of the requirements of this RFP will not be considered. Individuals or firms should not assume that they will have an opportunity for oral presentations, so they should submit their most favorable proposals as their initial proposal. An oral presentation and interview may be held for purposes of clarification of proposal content and to ensure the full understanding of and responsiveness to RFP requirements. Individuals or firms will not be provided an opportunity for proposal revisions.

# AdNet

## Vision

To advance our communities by inspiring philanthropy.

## Mission

We support community foundation professionals through driving innovation, promoting best practices, and sharing experiences.

## Values

- **Advance** diversity, equity and inclusion in the community foundation field
  - **Build** relationships based on trust
- **Support** our members in becoming authors of opportunity and agents of change in their communities
  - **Work** through collaboration and partnerships