

Seeking Proposals for Professional Association Management Services from Qualified Individuals and Firms



A. Requirements

The Association for Library and Information Science Education (ALISE) is seeking proposals from qualified individuals and firms for the provision of professional association management services to ALISE. The following Request for Proposals (RFP) describes the areas of expertise that are sought in support of ALISE meetings, activities and administrative tasks. ALISE seeks to establish a contract with an individual or firm that is experienced in providing professional association management services. The ALISE 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 ALISE considering the evaluation factors set forth in this RFP.

Term of Contract

The initial contract resulting from the RFP will be effective after approval by the ALISE 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 ALISE officers. ALISE will determine when it will be appropriate to issue a new RFP for management services or to renew for a successive contract.

B. Background Information

The Association for Library and Information Science Education (ALISE) is the global voice of library and information science education. With over 500 personal and institutional members, ALISE leads innovative and high-quality research, teaching, and service for educators and scholars in library and information science and cognate disciplines internationally through engagement, advocacy, and knowledge creation and dissemination.

Please visit alise.org for more information about ALISE, including its organizational units, membership, publications, conferences and upcoming events. Please contact ALISE President Heidi Julien at 205-310-8823 or heidijul@buffalo.edu with any questions.

C. Scope of Contracted Work

The following information, provided to prospective individuals and firms, describes ALISE's expectations of the awarded contractor's responsibilities, as they relate to providing professional association management services to ALISE. The selected contractor will report directly to the ALISE President and its Board of Directors. The scope of contracted work includes, but is not limited, to:

Meeting and Event Support

- Manage ALISE's annual on-site conference held in selected cities nationally
- Serve in an advisory capacity to event chairs and association leadership, communicating event logistics to committee/event chairs, members and participants
- Provide reports and prepare materials for virtual (monthly) Board meetings as requested
- Assist with and/or host virtual events (e.g., webinars)

Membership Support

- Maintain current the membership database
- Provide monthly reports of membership and other lists as requested by ALISE leadership
- Remind members of renewals and process membership payments
- Advise and coordinate with Director of Membership Services and ALISE leadership on recruitment strategies

Financial Support

- Manage ALISE’s finances at the direction of the Treasurer and Board, maintaining current all financial data using relevant software
- Provide financial reports as requested by Treasurer and Board
- Assist Treasurer and Board with annual budget preparation
- Prepare information for annual audits and other financial filings

Website, Social Media and Publications Support

- Serve as webmaster and ensure that all content is accurate and posted in a timely fashion
- Post ALISE news and activities, and other news of interest to ALISE membership on ALISE website
- Support Director for External Relations with streaming news on social media
- Post job announcements in a timely fashion, and activate and deactivate job listings upon request
- Prepare and send out electronic correspondence (emails, announcements, etc.) at the direction of (or in the absence of) ALISE leadership, editors of ALISE publications, and Committee and SIG Chairs
- Identify, negotiate and maintain current vendor/software contracts in coordination with Board to support communication and publishing activities
- Maintain permission levels on the website, cloud servers or software with annual leadership changes

Administrative Support

- Respond to telephone calls, emails, mail, social media, etc.
- Oversee administrative print and electronic files and records, and coordinate their transfer to the institutional archives or repository
- Maintain passwords, log-in information and other important details for all accounts
- Manage association equipment, supplies and software (e.g., credit card machines, banners, member nametags)

Leadership/Committee Support

- Assist in the implementation of directives of the executive committee and board of directors
- Maintain contact list of association leadership and provide to leadership
- Assist with tactical implementation of events/activities as requested by committee leaders and Board
- Assist with donor/sponsor and partner/affiliate relations
- Coordinate all aspects of Board meetings, including assisting the President with setting the agenda, providing Board with meeting materials, and reimbursement instructions, in a timely manner
- Assist committees and SIGs with information on procedures and policies to conduct their work

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, ALISE will evaluate proposals on the basis of 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 ALISE Board with an overall understanding of the proposal and the individual/firm’s approach.

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

3. Individuals/firms must address the following requests:

- Identify how you will manage, service and support ALISE.
- 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 ALISE.

4. An outline of the individual/firm’s credentials and the professional experience of individual staff members intended to provide services as a result of an awarded contract — positions held, past clients, etc. Individuals/firms should include resumes or other descriptions of relevant past experience and qualifications of key individuals who will work with ALISE.



While ALISE does not limit the individual/firm's ability to assign or reassign personnel during the period of contract performance, the past experience, qualifications, and education of the key individuals are expected to represent a contractual commitment by the individual/firm to retain comparably skilled and qualified individuals during the contract.

5. Individuals/firms must references from organizations for which you have provided support. Please provide:

- Organization name, Address and Phone number
- Contact name, title and e-mail
- Website address (If applicable)

ALISE may contact the individuals listed to validate the nature of the individual/firm's experience, as well as other individuals who may be identified as having relevant information during the course of those discussions. ALISE reserves the right to consider references by those individuals concerning the scope of activities/services, timeliness of performance, association management capabilities, or other information relevant to determining the quality of the individual/firm's past experience and demonstrated capabilities.

6. Fee Structure

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

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

Submission and General Instructions

Individuals and firms responding to this announcement shall submit their proposal by email to ALISE President Heidi Julien (heidijul@buffalo.edu) by May 18, 2018. Late proposals will not be accepted.

Important Dates	Deadline
1. RFP Notice – Open for Submission	April 19, 2018
2. Proposal Submission Deadline	May 18, 2018
3. ALISE Board Review, and Oral Presentations and Interviews	June 11, 2018
4. Approval by ALISE Board of Directors and Contract with Selected Proposal	June 18, 2018

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. Please note that any additional information, other than the 10-page submission and resumes, will not be reviewed. Font size for basic narrative descriptions must be no smaller than 12-point Times New Roman. The subject line should read: ALISE Proposal for Professional Association Management Services.

E. Evaluation and Selection Process

The ALISE 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 ALISE. Numeric evaluations will be used to identify strengths and weaknesses of proposals and to establish a ranking 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/firm's experience, qualifications, and key personnel, and the extent to which the qualifications, experience, and past performance are likely to foster successful, on-time performance

Proposals that are incomplete in terms of the requirements of this RFP will not be considered. Individuals/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/firms will not be provided an opportunity for proposal revisions.

All individuals/firms must meet the minimum requirements established by this RFP to be eligible for award. ALISE reserves the right to reject any and all proposals or parts thereof. Proposals resulting from this solicitation shall be available for use by ALISE.

