

Preparing Successful Requests for Proposals (RFPs)

An RFP is the first step to creating a successful relationship with your organization's management (and other vendors). Preparing an RFP is not unlike conducting strategic planning. It's not enough to just generally recognize that things have to change. Take the time to evaluate your environment and culture, the current situation and the challenges you face now and possibly in the future, and your association's strengths and resources. Identify specific goals for making a change in management, hiring professional management for the first time or contracting for specific services.

Consider which services and expertise you will need to respond to your strategic evaluation and fulfill goals that cannot be provided by volunteers or are needed to support volunteers. Identify the major areas of service Ex. headquarters presence, database, meetings and events, finances, communications, leadership support, etc. then brainstorm a list of your needs within each area of service.

It's very important to be realistic. Hiring an AMC to manage your association is a cost effective way to get essential services and expertise but, too often proposals contain *everything* an association needs done, including everything volunteers currently do. The result is sticker shock. Frequently, especially in hiring a professionally staffed AMC for the first time, a comprehensive package is not within the limits of the association's budget. Most important, the strength of an association is in the engagement of its members, using their talents to do what they can do well within the restraints of time, with proper professional assistance.

Realistically rate the desired services and expertise as ...

Must have

Nice to have

May be able to have in the future (the "wish" list)

Now you're ready to create your RFP outline. The goal is to receive *accurate* and *thorough* responses from *appropriate* companies. Take the time to identify a limited number of appropriate companies to receive your RFP rather than broadcasting your RFP to the entire industry and potentially overwhelming your search committee with responses. ASAE has a very helpful directory.

A RFP package for association management should provide background information about your association, its purpose and goals, membership, governance, program of works, financial status; sample documents and marketing materials; a well-organized outline of requested services with enough quantifiable details for respondents to provide comprehensive and accurate proposals; a clear (and realistic) time line for the search process; and contact information.

An RFP is a reflection of your association's leadership and your association. Take some time to edit and create a good first impression, and to ensure you receive the best possible proposals.

A review of the basics:

- Identify what you ultimately hope to accomplish by acquiring or changing management.
- Be realistic. Distinguish what you really need from what you wish you could have.
- Be thorough and specific. Include as much quantifiable information as possible to elicit accurate estimates of cost.
- Ask several people to review the proposal for its organization, completeness and clarity, and to suggest edits.
- Appropriately identify and limit how many companies receive the RFP to avoid overwhelming your search committee.
- Designate a knowledgeable member of the committee to answer questions.
- Establish a rating system and form for evaluating proposals to facilitate the review process.
- Develop a realistic timetable for the process.