

REQUEST FOR PROPOSALS
For Interim Management Services
February 17, 2009

Introduction

The Community Leadership Association (CLA) is seeking an experienced association management firm, organization or individual to provide ongoing management services, as well as executive level consultation and fundraising/grant expertise. The firm, organization or individual should be able to provide access to a senior level executive, preferably a CAE (Certified Association Executive). Experience in managing associations with regional and local components is a plus. Specialized education in organization management, such as the US Chamber of Commerce's Institute for Organization Management and/or graduation from a community leadership program are desirable.

The effective date of the transition to be completed will be April 26, 2009.

Background

The Community Leadership Association is a 501 C (3) non-profit organization, founded in 1979, dedicated to nurturing leadership in communities throughout the United States and internationally. CLA has a membership of approximately 250, representing community leadership programs and those involved in such programs. There are an estimated 1,500 community leadership programs in the U.S. and abroad. Combined, these programs have an estimated 1,000,000 graduates. One of CLA's primary activities includes an annual conference which generally takes place in the spring. Under current agreement, the management of this conference has been outsourced through 2010. Additional CLA activities include technical assistance through the office, resource materials – how to set up and run a program, how to use concepts such as trusteeship and/or servant leadership within their program; and programs and training through regional events which might focus on any of four areas – leading thinkers about leadership; 21st century leadership skills development; best practices in leadership development; and, best practices in operating a leadership program.

CLA is governed by a Board of Directors who meet monthly via phone conference and periodically in person. CLA is currently managed under the auspices of The Fanning Institute, a multidisciplinary outreach unit within Public Service and Outreach at the University of Georgia. Within this arrangement, an executive director and a program assistant oversee CLA activities.

Upon recent review of the financial condition of CLA and the financial arrangement with the Fanning Institute, the Board of Directors concluded it was no longer sustainable and has chosen to end this arrangement. A respectful transition has begun and a transfer to new management is

targeted by the completion of the CLA Annual Conference in April 2009. The Board believes an interim period of up to one year is needed to maintain business continuity, implement cost effective systems and increase fiscal stability. By the end of the interim period the Board envisions that CLA will be positioned for a financially viable future that can harness the potential in providing the resources to support and grow the community leadership movement throughout the world. This may include new programs such as building a nationwide leadership and social network as well as creating effective component/affiliates at the regional and local levels. At this time the Board is seeking proposals from association management sources to manage the CLA operations during this interim period.

Ongoing Scope of Work

The ongoing management tasks will include but not be limited to:

- Membership dues processing
- Accounting (accounts payable, receivable and reporting)
- Renewal notices (at least 250 sent via U.S. postal and electronically)
- Database management (approximately 250 members with another 200 prospects)
- Web site maintenance
- Member communications, including a weekly communications blast of one good idea adaptable to CLA member programs. Potential sources of ideas include CLA Conference presentations and member contributions.
- Member services (handling individual member inquiries)
- Serving as the central office for the association (including phone, fax, e-mail, mail processing)
- Executive consultation of up to four (4) hours per month initially and possibly more as we get into the interim period.

Additional Capabilities

Although funding may not be available at this time to provide the additional services, the firm should be able to offer the following additional capabilities and provide current hourly rates for these services.

- Brand audit and re-design of printed and Web materials
- Membership benefit package development/campaign
- Grant writing
- Corporate sponsorship program development
- Strategic planning
- Social network development
- Ability to develop high power database with information and search capabilities on the CLA website (e.g., searchable by program offerings like new execs, junior, young professionals, etc.).

Facility and Equipment/Software Requirements

Because of the nature of CLA's needs, there is no requirement for a physical facility, as long as incoming communications of all types are monitored. Web based applications for database management and accounting are preferable because of the flexibility, security and transparency they provide. CLA will have some archive storage needs (yet to be determined).

Transition: The selected firm should be willing to send one executive level representative to the CLA conference in Long Beach, CA April 22 - 26 at CLA expense. In addition, the management firm should be willing to send at least one executive level staff representative to meet with the current management firm. (Provide an hourly rate for travel and attending client meetings). In addition, the firm will need to provide a quote for the time involved in setting up database systems, accounting systems, office functions, and redoing printed materials with address/phone information. The firm should provide CLA with a transition checklist to ensure that all functions are properly handled in conjunction with the move.

The Long Term Future: Proposals should explain how the firm can assist CLA is attaining long term growth, value and relevance.

Submission Requirements: Submit electronically in pdf file no later than March 25, 2009 to rfp@communityleadership.org.

It should be understood that proposals will be based on projections for hours to be spend on the contract. Should the actual hours spent be more or less than projected, both parties must agree to an adjustment. Interested parties are asked to specifically provide information on employee theft coverage, as well as a copy of their internal controls document. Proposals should list three or more references, including contact information. Proposals should also include a cancellation provision.

Questions will be accepted from interested parties and should be submitted in a timely manner to rfp@communityleadership.org. Please e-mail submission of questions. Answers to substantive questions that have not previously been answered, and are not clearly specific only to the requestor, will be posted on the CLA website [here](#).

Submit replies to this RFP by March 25, 2009. Please respond to:

rfp@communityleadership.org