



UNIVERSITY ECONOMIC DEVELOPMENT ASSOCIATION

Request for Proposals

Executive Director and Association Management Services

Posted on: July 1, 2022

Responses due: 5:00 PM EST, August 15, 2022

1.0 Background

1.1 Overview of the Opportunity

UEDA is seeking candidates (individuals, universities, non-profits, or companies) to serve as executive director of the organization and provide association management services to the organization. The successful candidate will exhibit leadership, organizational skills, knowledge of higher education, marketing ability, business acumen and the capacity to manage a growing and complex association.

The selected candidate will report directly to the UEDA President and the UEDA Board of Directors Executive Committee. The organization is seeking to invest in a long-term commitment, based on satisfactory performance, with the selected candidate to ensure the continuity of the organization's efforts. Specifically, the organization is seeking to hire an executive director for an initial 3-year contract with the option for an additional 3-year contract if performance goals are achieved. The estimated annual budget for this engagement is between \$125,000 to \$150,000 annually with the opportunity for bonuses based on performance.

1.2 About the University Economic Development Association

Established in 1976, the University Economic Development Association (UEDA) is the cornerstone membership organization representing higher education, private sector and community economic development stakeholders. UEDA works to expand economic opportunity in our communities by leveraging research, community resources, campus planning, talent development, and technology commercialization. Our membership represents those at the leading edge of modern economic development thinking and practice. UEDA serves its members by promoting knowledge and practice in the realms of talent, innovation, and place as drivers of regional prosperity.

Mission

UEDA serves its members by promoting knowledge and practice in the realms of talent, innovation, and place as drivers of regional prosperity.

Vision

UEDA, and its members, will be the leaders in advancing regional economic engagement fueled by higher education.

More information is available at www.universityeda.org.

1.3 Overview of UEDA's Membership, Ongoing Initiatives, and Future Priorities

UEDA has a diverse membership of over 80 institutions of higher education across the United States. At its core, UEDA is a community of practice of higher education officials engaged in economic and community development work that provides forums for best practice sharing including webinars, the Annual Summit, and UEDA's signature program, the Awards of Excellence (AoE), which highlights achievements of members in the areas of innovation, talent, and place.

The organization is led by a volunteer board of directors with fiduciary responsibilities managed by an executive committee of the board comprised of the President, President-elect, Vice President, Secretary, Treasurer, and Immediate Past-President. The work of the organization is largely managed through a committee structure of the following:

- Membership and Marketing Committee
- Annual Summit Committee

- Awards of Excellence Committee
- Finance Committee
- Development Committee

In addition, UEDA hosts monthly convenings of three affinity networks in the areas of talent, innovation, and place.

In 2021, UEDA and Virginia Polytechnic University were awarded a three-year cooperative agreement from the Economic Development Administration's (EDA) Research and National Technical Assistance (RNTA) program to establish the American Resilience and Equity Network Initiative (ARENI). Through ARENI, UEDA will develop networks, resources, and webinars highlighting best practices in the areas of economic resilience and equity and inclusion. Additionally, UEDA will develop a community of practice for EDA University Centers to facilitate best practice sharing, collaboration on regional initiatives, and opportunities to highlight the important work of University Centers across the United States.

Given the high-profile nature of ARENI and the support from EDA, UEDA has a unique opportunity to expose hundreds of institutions of higher education to our organization, including HCBUs and HSIs who have traditionally not been members of the organization. Converting new institutions that are interacting with UEDA into members and annual summit attendees is crucial to the long-term financial sustainability of the organization and will be a key priority for the UEDA Board of Directors and the Executive Director.

The organization's top challenges and opportunities for the years ahead include:

- Sustaining and growing membership
- Creating long-term financial sustainability
- Increasing member engagement in committees and other activities
- Ensuring the success of the ARENI project

2.0 Scope of Work

UEDA is seeking candidates (individuals, universities, non-profits, or companies) to serve as executive director of the organization and provide association management services to the organization. The successful candidate will exhibit leadership, organizational skills, knowledge of higher education, marketing ability, business acumen, and the capacity to manage a growing and complex association.

At a high-level, the Executive Director of UEDA will:

- Serve as the face and primary contact of UEDA to external stakeholders including prospective members, sponsors, and partners.
- Manage the day-to-day operations of the organization including membership recruitment, marketing, website/social media management, financial management, and operations management through UEDA's Member 365 portal as well as email, phone, virtual, and face-to-face communications.
- Provide events management for the organization including the development of virtual webinars and the management of the UEDA Annual Summit.
- Oversee UEDA's ARENI Initiative and work closely with ARENI contractors to ensure the successful implementation of the program.
- Provide support as needed to the UEDA Board of Directors and committee chairs/members.

- Oversee and assist in the development of other external funding opportunities that may become available.
- Suggest best practices and provide leadership in bringing new initiatives to the organization.

2.1 UEDA Executive Director Responsibilities

UEDA envisions the Executive Director's responsibilities will include, but not be limited to:

General Operations of the Organization

Leadership and Business Management

Work closely with UEDA Board of Directors to drive positive organizational growth across all levels of the association, ensure that the association is responsive to the needs and concerns of UEDA members and provide administrative support to Board of Directors and its committees. This includes but is not limited to:

- providing appropriate staff services to UEDA board and committees serving in the capacity of Executive Director, and other appropriate personnel to implement this scope,
- providing periodic Board updates and assisting Executive Committee and Board of Directors in performance of their duties,
- staff UEDA strategic and operational planning efforts
- assisting with establishing time commitment priorities by consulting with committee chairs to determine the level of support those committees require from the Executive Director.
- maintaining the organization's project management tools,
- creating content, building capacity and refreshing the UEDA website and social media presence,
- fostering innovation and recommending new business solutions,
- coordinating all event/meeting logistics,
- administering contracts on behalf of UEDA including negotiating, preparing, supervising and managing contracts for services including events management, grants, accounting, web, printing and other services and partnerships,
- ensuring appropriate and timely insurance for the organization,
- work closely with the Treasurer and finance committee to ensure fiscal responsibility and oversight
- working to establish positive relationships with organization strategic partners, and

Financial Management

Provide appropriate and professional operational, fiscal and budget management services for the successful operation of UEDA. This includes, but is not limited to:

- retaining bank account in the name of UEDA,
- maintaining financial records and supporting treasurer in providing regular reports to the UEDA Board of Directors,
- regular financial record reconciliation,
- invoice processing of vendors,
- collection of income from members/sponsors/registrants,
- ensuring consistency in record-keeping between financial management software and Member365 platform.
- working with Treasurer and finance committee on maintaining strong financial health,
- developing and managing budget in collaboration with the treasurer and UEDA Executive Committee
- responsible handling of funds,
- conducting internal audits as necessary,

- facilitating and procuring an external audit from an independent accounting firm on an annual basis,
- facilitating and procuring financial reconciliation services from an independent accounting firm,
- working with accountant to accurately and promptly file tax reporting (including IRS Form 990) annually,
- strategically drive revenue diversification as possible, and

Membership Services and Expansion

Member Services

Ensure timely and professional communications and interactions with UEDA members. Overriding goal is to become a strong, national voice of institutions of higher learning and become the “go-to” provider of information and resources to institutions engaged in economic development. This includes:

- timely invoicing of members,
- resolving all member needs,
- connecting members to each other,
- processing regular email communications with the membership,
- disseminating at least monthly newsletters, at least weekly social media posts, and blog posts, press releases and other marketing materials as needed to highlight UEDA efforts
- providing leadership to organizational teams,
- updating organization website,
- maintaining organization CRM (or similar contact system/technology), and

Member Retention and New Member Attraction

In conjunction with UEDA Vice President/President-Elect and Membership & Marketing Committee, conduct marketing to attract new members to UEDA and develop programs/strategies for retaining existing members. Generate new excitement and energy for UEDA as an organization. This includes, but is not limited to:

- marketing to new members,
- receiving and processing requests for information regarding UEDA membership,
- maintaining user-friendly workflow and engagement strategies to promote long-term membership retention,
- processing new membership onboarding including ensuring timely invoicing and member account management,
- implement the annual workplan developed by the Membership and Marketing Committee.
- coordinate with the ARENI committee to implement strategies to convert network participants into UEDA members.
- building and improving member value projects, specifically the affinity networks and webinars.
- working with teams to facilitate membership growth and retention, and
- Exploring and negotiating an agreement with APLU to provide IEP designation programming to UEDA members, as directed by the UEDA Executive Committee,
- providing UEDA’s administrative support as required by the APLU agreement with UEDA,
- recruiting and onboarding prospective IEP universities,
- processing invoices to IEP universities and fees to APLU according to the APLU agreement with UEDA, and
- recruiting volunteers or providing workshops, conference sessions, webinars or other deliverables as required by the APLU agreement, and
- managing logistical support delivery of IEP-related events and webinars.

Events Management

Annual Summit

In cooperation with the UEDA President Elect or Vice President and UEDA Summit Committee, plan, execute, and deliver a successful Annual Summit. This includes, but is not limited to:

- appropriate planning for current Annual Summit, including providing staff support for the Summit Committee,
- collaborating with the committee to set the Summit theme,
- developing a timeline and budget for implementing the meeting,
- organizing any pre-conference rallies or events focused on driving local engagement in the Summit planning,
- forward planning for Annual Summits for next two years,
- providing marketing support to drive registration,
- developing timeline and meeting deadlines
- developing and improving processes and mechanisms to enhance Summit engagement (such as website updates, receiving proposals, attendee registration, notifications, etc.)
- working with event planner to facilitate logistics of event,
- working with teams to secure and manage sponsorships,
- executing promised deliverables to sponsors with event coordinator,
- traveling for appropriate site visits as approved by the Board of Directors,
- working with teams to solicit engaging content for the Summit including recruitment and confirmation of speakers,
- working with the Awards of Excellence committee to solicit, review and select awards of excellence finalists for the Summit,
- coordinating the procurement of awards,
- creating press releases and communications to announce awards winners,
- conducting and marketing webinars and other programming as planned,
- coordinating post-conference evaluations, any post-conference follow-ups with speakers, attendees, event planner or other contractors, and

Annual Summit Event Coordination

(Note: These event coordination services are currently contracted to a third party and may continue to be if the selected operations management service provider(s) do not have sufficient event coordination capabilities. The scope and scale of the operations management contract will be commensurate.)

- Provide budget estimates
- Provide meeting planning logistical services for in-person or virtual events
- In-person event lodging management, food and beverage negotiations, audiovisual specifications and bids, on-site printing/signage, transportation, and venue logistical coordination, as needed
- Manage Summit and EDA event email, phone, and written inquiries
- Speaker management and deliverables for Summit and EDA event
- Sponsor management and deliverables
- Evaluation development and summary
- Gather and report actual expense and invoice information
- Site visit for next year and contract negotiations
- Oversee Summit and EDA event registration site, analyze and report data
- Coordinate shipping and return of materials as necessary
- Participate in regular meetings with Executive Director and Planning Committee
- Participate in wrap-up meeting with Executive Director

Virtual Webinars and Convenings

In cooperation with the affinity network leaders and the UEDA Board of Directors, plan, execute, and deliver virtual webinars and convenings. This includes, but is not limited to:

- Supporting volunteer leadership in advancing affinity networks including facilitating logistics for convenings, administering the online workspaces, and marketing the efforts, and
- collaborating with UEDA President in securing volunteer leadership to manage the networks.

Grant Projects

ARENI

The UEDA Executive Director will provide overall, daily project management of ARENI. The ED will manage contractors and will work with the Virginia Tech Lead to administer the grant, including:

- coordinating contractors,
- representing UEDA in official capacity to EDA/VT,
- coordinating with VT on financial management,
- payment of invoices, managing income and expenses,
- managing incoming and outgoing grant funds,
- supporting connection to the larger UEDA network, including emails to current members, including in newsletters, etc.,
- facilitating 'UEDA membership' onboarding of EDA,
- providing connections and referrals through larger UEDA network,
- coordinating meetings about grant administration,
- For meetings and events, coordinating annual in-person event, and webinars and virtual events, providing connection to larger UEDA network; sharing and promoting with larger UEDA network, as needed,
- sharing resources and best practices from larger UEDA network, and
- supporting VT in reporting.

3.0 Proposal Responses

Individuals, universities, firms, non-profits, or a collaboration of individuals and firms are welcome to respond to this RFP, however, all proposals must identify one person to serve as the UEDA Executive Director. UEDA welcomes proposals from contractors to provide the identified services. Please follow the directions below for proposal development.

3.1 Crafting a Proposal

All proposals submitted must be in the format outlined below. Submissions should be **no more than 20 letter-size pages, single-spaced in readable 12-point font size**. Appendixes are permissible and should not count towards this limit, but please include only necessary support information, or direct UEDA to online resources, where appropriate, to limit paper waste.

Questions may be submitted to UEDA President-elect, Russell Mills in writing to millsrw@bgsu.edu with the subject line of "UEDA Executive Director RFP Questions". Questions about this RFP must be made in writing by 5:00 PM EST July 15, 2022.

3.2 Proposal Format

Please use the format below to submit your proposal. At a minimum, please address the questions listed below and other items addressed in the Scope of Work within each section of your response. Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

Introduction

Please give a brief overview of your proposal and an abstract of your approach.

Section 1: Introduction of Project Team

- Introduce you, your firm, or your organization(s) providing a response.
- Do you have any diversity certifications as a business?
- Include brief bios for any team members, and their experience/alignment with association management.
- Describe in detail the role that each team member will play in achieving the scope of work listed in this RFP (organizational charts with specific duties are preferred).
- As an appendix, please include the resume for the person serving in the role of the UEDA Executive Director.

Section 2: Approach to Scope of Work

- Please share your overall strategy and approach to achieve the scope of work.
- Specifically address how your activities will assist UEDA in their effort to grow and sustain their membership.
- What sort of project management skills/resources do you have in place or plan to put in place to manage the scope?
- Describe your approach/reaction to each section of the scope and identify how you plan to address the support needs of each section.

Section 3: Vision for the Organization

- Specifically address how you will address UEDA's top challenges and opportunities.
- What new innovations or approaches will you bring to UEDA to advance the organization?
- Where do you see opportunities for improvement or changes for the organization and how would you approach making changes within the association?

Section 4: Aligned Experience

- Describe your experience with customer relationship management (CRM) platforms.
- What experience do you have in managing and overseeing the finances of associations? Also, please describe your experience with financial management tools such as QuickBooks.
- What experience do you have in marketing and communications for an association?
- What experience do you have in managing both virtual and in-person events? Please describe a successful event your team recently implemented.

Section 5: Project Timeline & Budget

Please share a project activity timeline, as well as a budget that corresponds with the timeline. Please include any commentary to help the review team understand milestones, deliverables, and expenses. Although this is a fixed-cost contract between \$125,000 and \$150,000, please include your billable rate as well as anticipated hours to achieve each component of the scope of work.

Conclusion

Please provide a 300-word summary of your proposal.

Appendix

Please provide any support materials for your proposal. Include the resume/cv of the proposed UEDA Executive Director. Please keep other materials brief, with links to online resources to conserve paper.

3.2 Submission Process

UEDA requests one (1) electronic copy of the proposal be submitted to be considered.

A PDF copy of the proposal should be submitted to millsrw@bgsu.edu with the subject "UEDA Executive Director RFP Response"

All proposals should be received no later than 5:00 PM EST, August 15, 2022.

Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to UEDA. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. UEDA will schedule the time and location of these presentations. Oral presentations are an option of UEDA and may not be conducted. Therefore, proposals should be complete.

3.3 Review Process

The following timeline will be targeted for the purposes of adequate review and approval of proposals:

July 1, 2022	RFP Released
July 15, 2022	Questions on RFP due
August 15, 2022	Proposals due to UEDA headquarters (by 5:00 PM EST)
August-September 2022	UEDA review team to review proposals and candidate interviews
September 15, 2022	Preferred candidate notified of decision
September-October 2022	Contract negotiations with preferred candidate
November 2022	Contract finalized. UEDA notifies all applicants of proposal status.

Questions about this RFP must be made in writing to UEDA via email at millsrw@bgsu.edu by 5:00 PM EST July 15, 2022.

3.4 Selection Criteria

Proposals will be scored by a review committee of UEDA Board Members using the following criteria:

- Proposal clearly identifies proposed UEDA Executive Director and firms/organizations responsible for providing association management services. Team roles and responsibilities are clearly defined and are appropriate given the scope of work.
- Proposal outlines an innovative strategy to achieve the scope of work and presents a detailed approach to grow the membership of the organization. The proposal clearly and completely addresses how the team will achieve each item listed in the scope of work.

- Respondent team lists appropriate experience that clearly demonstrates understanding of the scope of work and an ability to achieve success.
- The proposed timeline clearly identifies milestones and reasonable checkpoints to ensure continued implementation of the scope of work.
- The proposed budget is clearly outlined with estimated number of hours for each scope of work item. Rates for staff are clearly outlined and assigned to scope of work items to provide a full estimate of the cost.

3.5 Other Considerations

UEDA is not responsible for time reimbursement pertaining to the development of a proposal in response to this solicitation.

This request for proposals, responses to questions and any documentation relevant to this RFP will be located online in the news section of our website. Any responses to questions, as well as any amendments to this request for proposals will be posted to this section of the website. Respondents are responsible for checking this resource to ensure the most up-to-date information is included as part of their response.

UEDA reserves the right to negotiate with proposing organizations.

4.0 ATTACHMENT A

SAMPLE TERMS AND CONDITIONS

ADDITIONAL TERMS AND CONDITIONS 1-9 apply to and will be used on all contracts.

1. **ADDITIONAL GOODS AND SERVICES:** UEDA may acquire other goods or services that the supplier provides other than those specifically solicited. UEDA reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment. UEDA, its authorized agents, and/or State/Federal auditors shall have full access and the right to examine any of said materials during said period.
3. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that UEDA shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
4. **CANCELLATION OF CONTRACT:** UEDA reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **CONTRACT DOCUMENTS:** The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the UEDA Standard Contract Forms, all of which shall be referred to collectively as the Contract Documents.

6. **IDENTIFICATION OF PROPOSAL EMAIL:** UEDA will only be accepting electronic submission of proposals. All submissions must be submitted to millsrw@bgsu.edu . Your submission will be confirmed by email within 24 hours. It is the responsibility of the offeror to make sure their proposal is delivered on time. Attachments must be smaller than 1000MB in order to be received by the UEDA. Proposals may NOT be hand delivered.

7. **NOTICES:** Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.

8. **SEVERAL LIABILITY:** UEDA will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.