



CHAPTER MANAGEMENT SERVICES REQUEST FOR PROPOSAL (RFP)

- ISSUE DATE: November 7, 2023
- DUE DATE: **5:00 P.M.** on **November 21, 2023** (“Submission Deadline”)
- INSTRUCTIONS: Please submit one (1) electronic copy of your response to the Request for Proposals (“RFP”) via email to admin@pbcshrm.org no later than 5:00 p.m. on November 21, 2023. Subject line should read “Response to RFP – Chapter Management Services”. Proposals must be submitted by authorized officials. All electronic files should include the name of the company as the first part of the file name. Submittals received by hand delivery, fax, or after the Submission Deadline will be rejected.
- SUBMIT TO: PBC SHRM, Attn: Chapter Administrator at admin@pbcshrm.org
- CONTACT INFO: Any questions concerning this RFP must be submitted by email to Chapter Administrator at admin@pbcshrm.org no later than 10:00 a.m. on November 14, 2023.
- RESTRICTIONS: Responses will be provided only to clarify questions concerning the RFP. PBC SHRM requests that no other member of the governing board be contacted during this process. PBC SHRM shall have the right to reject any proposals due to violation of this provision. PBC SHRM shall be mindful that any selected person or company render such services in an independent and non-biased manner, with full consideration being given to doing what is best for the ongoing existence/viability of the Chapter, and with no Conflict of Interest to the Chapter.

OVERVIEW

The Board of Directors of Palm Beach County SHRM, hereinafter called “PBC SHRM,” invites qualified professionals, having sufficient nonprofit experience in performing association management services in accordance with the specifications outlined in this Request for Proposal (RFP) to submit a proposal. It is our desire to evaluate, establish and dedicate the programs, tools and resources needed to ensure the effective, appropriate, and cost-efficient solutions needed to maintain our Chapter are provided. It is expected that these solutions will survive each year’s current leadership and allow for the proper ongoing maintenance and transition of all documents, resources, tools, passwords, accesses, etc., and ensure that this transition continue to occur such that each/all new Chapter Boards/Leadership teams can assume Chapter management responsibilities without the burden of re-establishing new tools/resources each year.

There is no expressed or implied obligation for PBC SHRM to reimburse firms for any expenses incurred in preparing proposals in response to this request.

The specific details shown herein shall be considered minimum unless otherwise shown. The specifications, terms, and conditions included with this RFP shall govern in any resulting contract(s) unless approved otherwise in writing by PBC SHRM.

BACKGROUND

Palm Beach County Society of Human Resource Management (PBC SHRM) is a vibrant community of HR professionals. We are the premier local chapter representing the esteemed national Society for Human Resource Management (SHRM) on a global scale. We operate as one of twenty-eight chapters in Florida under the auspices of HR Florida which is the designated state council for Florida within the national SHRM organization.

Established in 1968, PBC SHRM has a rich history of advancing the HR profession and contributing to the growth of our local business community. As a 501(c)(6) nonprofit organization, we have been dedicated to promoting organizational excellence through the development of human resources professionals.

At PBC SHRM, our mission is clear: to promote organizational excellence through the advancement of the human resource profession and to foster strong partnerships within our business community. As the go-to resource for HR professionals in Palm Beach County, we offer a wide array of events, education, and services designed to support your growth and success in the HR field.

For more information, visit our current web site at www.pbcshrm.org.

BUSINESS NEED

PBC SHRM is seeking solutions to manage its day-to-day chapter operations, adhering to the policies established by PBC SHRM and the national Society for Human Resource Management (SHRM).

PBC SHRM is managed by a volunteer leadership team consisting of Board of Directors and Committee Chairmen who in their various roles are responsible for maintaining organizational files including minutes and other permanent corporate, legal and historical documents; managing the chapter's website which include features such as membership access, event registration and payment processing and hosting several monthly events to engage the chapter's 500+ members. And while the Chapter's leadership provide an Oath and agree to perform their services according to the established bylaws of the Chapter and act in good faith at all times, it is understood that their role/functions are completely voluntary/unpaid, and may not include actual Chapter management, therefore, further assistance is needed. For this reason, we are seeking additional support/assistance, as follows:

Scope of Services

Your proposal is expected to cover the following professional services:

- Project A: Technology Analysis and Implementation (required)
- Project B: Financial Application Review and Integration (required)
- Project C: Association Policy/Procedure/Bylaws Update or Development (optional)

Project A: Technology Analysis and Implementation

- Microsoft 365 purchase and implementation for board/leadership members
 - Installation on to the Chapter's laptop

- GoDaddy email transition to Microsoft 365
 - Issuance of new email addresses for all Chapter leaders.
 - Provision for maintenance of emails over time
- Google Drive transition to Microsoft SharePoint
 - Issuance/training of access to SharePoint for all approved Chapter Board/Leaders
- Zoom to Microsoft Teams
- Website Update (Current System: Wild Apricot)
 - Coordination/transition from old website to new website, without losing Chapter event/membership information no later than by February 1, 2024
 - Work with board/leadership team to update content for each leadership area.
- Vimeo (Video platform)
 - Assist with setting up access and monetization of video platform options.
 - Evaluate/recommend if/when an 'Enterprise' option would be an option
- Canva
 - Ensure new email addresses/Chapter Admin are set up on Canva
- Implement a platform for generating surveys

Project B: Financial Application Review and Integration

- Work with Treasurer and Finance Chairman to review the financial processes and platforms (including the following) and make recommendations for efficiency/appropriateness:
 - AffiniPay
 - QuickBooks
 - Square
 - PayPal
 - Cash App\Venmo
 - Debit Card Policy
 - Banking accounts/set-up/maintenance

Project C: Association Policy/Procedure Update or Development (Optional)

- Work with Board/Leadership Team members to develop Standard Operating Procedures (SOPs)
- Develop a central library of administrative accounts login credentials.
- Ensure all historical documents, Chapter business is saved/archived appropriately
- Facilitate a Bylaw review and draft new Bylaws.

Finally, please include an hourly rate for other chapter management/governance advisory services.

TERM OF AGREEMENT

Upon notice of selection, PBC SHRM intends to enter into a contract (Agreement) with the Proposer (Consultant) for the time needed to complete these tasks, which we reasonably expect may take no longer than six (6) months, based on performance. The response to the proposal needs to include the proposed dates/timelines for the anticipated completion of each of the individual deliverables, within a reasonable window for full scope of the project. The entire process cannot take longer to complete than by May 31, 2024, with possible approved extensions to go no further than to August 31, 2024, as the approval of anything further requires future leadership approval. PBC SHRM reserves the right to

terminate services at any time, and/or request alternate proposals at any time, should the Consultant not meet the terms of the Agreement or present the deliverables on the identified dates/times. With the submission of the appropriate time/services rendered documentation, the Consultant shall be paid for all services completed up to the time the termination of the Contract is provided. The Term of the Agreement would begin no later than January 1, 2024, and end on June 30, 2024 (the "Term"), unless sooner terminated or extended longer, according to the terms of the Agreement.

PBC SHRM may, in its sole discretion, further extend the Term in monthly increments beyond June 30, 2024, with additional approval from the Board, for up to an additional three (3) months (on a month-to-month basis), with a detailed listing of the additional work needing completion and with the same terms and conditions as provided in the Agreement - July 1, 2024 up to September 30, 2024.

PROPOSAL FORMAT (Requirements)

Proposers are asked to review the following criteria/information requests and respond, in order, to the best of their ability:

1. **Transmittal Letter:** Write a letter communicating effectively why the Proposer should be selected to perform the scope of services on behalf of PBC SHRM. The letter must be signed by a person authorized to make representations on behalf of the Proposer and include a direct phone number and email address.
2. **Company Profile:** Provide a brief profile of the Proposer, noting its history, structure, strengths, and ability to meet the needs of its clients. Provide a list of the Proposer's current and prior nonprofit clients and/or relevant experience, indicating the type(s) of services performed and the number of years served for each. Provide company name, address, a contact person, and telephone number of at least three, current or prior, clients who may be contacted for a reference. Please include a listing of either the individual contributor or the team member names that are proposed to support this project. Please advise if you maintain professional liability insurance.
3. **Management Strategy:** Describe the Proposer's approach to the Scope of Services, including Proposer's methods and abilities related to the services needed. Provide the name and summary of qualifications for the proposed Project Manager and a job description for each service position recommended by Proposer. This may include seminars and courses attended within the past three years, especially coursework in SHRM chapter management. Clearly and unambiguously, identify all services to be subcontracted, if any.
 - a. Describe the professional experience of assigned individuals in relevant nonprofit organizations, programs, activities, or functions.
 - b. Describe the assistance expected from PBC SHRM Board/leadership, if other than outlined in the RFP.
 - c. Provide the manner in which all services rendered will be maintained confidentially and securely.
4. **Pricing:** Proposals must include completed cost estimate and any other necessary cost information and include applicable management fee and all cost itemization for each labor classification for Proposer and subcontractor personnel. Cost estimates must indicate the basis for the charges and specify if the amount is a "not-to-exceed" amount.
5. **Project Schedule/Timeline:** Provide a tentative schedule for completing each of the proposed services within the specified deadlines of the RFP.

All information provided by Proposers should be organized, clear and concise. Although there are no page limits, Proposers are asked to avoid excessive graphics, title pages, or other extraneous information in their proposal other than requested by PBC SHRM.

EVALUATION & SELECTION PROCESS

PBC SHRM will appoint a selection committee to review and rank every proposal received in response to this RFP based on the following weighted criteria: Transmittal Letter (15 points); Company Profile (20 points); Management Strategy (25 points); Pricing (30 points); and a Discretionary component, which may include a Diversity Commitment (10 points).

PBC SHRM reserves the right to consider or reject any or all proposals, waive technicalities, and to be the sole judge of suitability of the services for its intended use and further specifically reserve the right to make the award in the best interest of PBC SHRM. Consideration should be given to the voluntary nature of the PBC SHRM Board/Leaders with whom the company may interact to complete this project, and factor additional time to account for their availability.

Failure to respond to any requirements outlined in the RFP, or failure to enclose copies of the required documents, may disqualify the proposal.

It is the intent of PBC SHRM to initially award one contract from this solicitation for Project A and Project B, however a single vendor may respond to all 3 projects. PBC SHRM intends to award the contract to the Proposer offering the best value to PBC SHRM, meeting the expectations for experience, approach, and cost requirements as measured by PBC SHRM and utilizing the foregoing evaluation criteria, including the right to award the contract by criteria other than the lowest price proposed. PBC SHRM Board/Leadership acknowledges its full fiduciary responsibilities to its Chapter members and intends to provide the best service/value possible when dedicating chapter funds/resources to complete this initiative, and as such, will not approve any frivolous or unsubstantiated costs or times for services rendered. PBC SHRM reserves the right to select or reject all or part of any proposal, waive minor technicalities, and select one or more proposals in the manner and to the extent that they are deemed to serve the best interests of PBC SHRM. This RFP does not commit PBC SHRM to award a contract or to pay any costs incurred in the preparation of a proposal in response to this RFP. PBC SHRM reserves the right to request proposal clarifications/additional information from some or all Proposers.

TIME SCHEDULE FOR AWARDING THE CONTRACT

Members of the selection Committee will review the proposals and make a recommendation to PBC SHRM's Board of Directors on or before December 15th, 2023. The full Board shall review the recommended proposal, and then vote on the approval. Once approved, the contract will be awarded.

The selected company/individual shall be expected to begin such services no later than January 1, 2024. Monthly written updates on the status of the initiatives as well as monthly billing must be provided to the Board no later than by the 5th of each successive month after the project is initiated.