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Extracting the Maximum Value from the RFP Process: One Society's Experience

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RFP Process: A rational approach

Reasons to undertake an RFP	<ul style="list-style-type: none"> Strategic planning, considering <i>new</i> service, due diligence You <i>need</i> to make a change in current service
Steps to get started	<ul style="list-style-type: none"> Determine your objectives Gather info about possible partners, then devise a plan
Best practices	<ul style="list-style-type: none"> Be clear, concise, and honest in your objectives Remain organized and communicate clearly and often
Evaluation of proposals	<ul style="list-style-type: none"> Discussion, guidance from an expert in the field (i.e., a consultant) In-person visits
Selection process	<ul style="list-style-type: none"> Comparison of bids and a Summary, discussion Transparency and buy-in
Contract negotiations	<ul style="list-style-type: none"> Consultant, Lawyer, Board Member Allow time, patience, persistence

RFP Process: Key Sections

- Background: This is who we are, and this is why we are issuing an RFP.
- Objective: This is what we are hoping to achieve with this RFP.
- Due Date for the Proposal: A reasonable deadline.
- Proposed Scope: Key facts for the bid.
- Specific Services Requested.
- Criteria for Evaluating Proposals
- Deliverables with the RFP
- Conflict of interest
- Basis for Selecting the Successful Bidder
- Additional information: Who to contact

RFP Process: In Practice

- Reason to undertake an RFP: Letter to the Executive Board of the Society from former Editors-in-Chief
- Steps to get started: Committee formed: My advice to them—get help!
- Best practices: Composed an RFP and contacted potential partners; everyone signed a non-disclosure agreement
- Evaluation of proposals: A consultant was brought in; In-person presentations; Committee, consultant, selected staff, Board
- Selection process: Advice from the consultant based on what our goals were. Discussion, visit to the partner's offices by EICs, Board members, me.
- Formal recommendation from the committee was made to the board.
- Contract negotiation: Objective outside help (i.e., consultant, lawyer) enlisted

Most important pieces of advice

- Change is exciting, necessary—and **hard**. Acknowledge and discuss what the changes will mean as often as needed.
- Be prepared to spend a lot of time and energy gathering information, answering questions, and having (sometimes) uncomfortable discussions.
- Keep the Big Picture in mind and know what really matters to your Society.
- Communicate and be as transparent as possible.
- Talk to others who have gone through a similar process.
- Don't do it alone.

Thank you!

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