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Legal Professionals, Incorporated Request for Proposals for Association Management Services

Legal Professionals, Incorporated (“LPI”) is seeking proposals from qualified individuals and firms to provide association management services to LPI.

The following Request for Proposals (“RFP”) describes the areas of expertise that are sought in support of LPI operations, meetings, activities, and executive/administrative tasks. LPI seeks to establish a contract with an individual or firm that is experienced in providing professional association management services.

The LPI Executive Committee will conduct an evaluation of submitted proposals and will award a contract to the individual or firm whose proposal is determined to be most advantageous to LPI, considering the factors set forth in this RFP.

The initial contract resulting from the RFP will be effective after recommendation by the LPI Executive Committee to its governing body, the Board of Governors, for approval. Upon said approval, the successful individual or firm will be asked to begin providing association management services on an agreed upon date for a period not to exceed one (1) year, with annual renewal contingent upon: 1) mutual agreement of the parties; and 2) contractual requirements being satisfied based on a mid-year review and an end-of-year review by the LPI Executive Committee. LPI will determine when it will be appropriate to issue a new RFP for management services or to renew for a successive contract.

Background Information

LPI is a California 501(c)(6) nonprofit, mutual benefit corporation. Founded in 1934, LPI was originally called the California Federation of Legal Secretaries. In 1940, the organization was established as a nonprofit corporation under the name Legal Secretaries, Incorporated. In 2020, the organization changed its name to more accurately reflect its mission to serve all legal professionals in California, and is now known as Legal Professionals, Incorporated.

LPI promotes connection and professional growth through meetings, conferences, social media platforms, online and in-person activities, seminars, and its professional publications. As the parent organization to 27 local associations representing over 1,200 members and members-at-large throughout the state, LPI is dedicated to educating legal professionals and promoting high ethical standards among all legal professionals.

LPI's motto "Excellence through Education" is paramount to the goals and objectives of the organization. The organization continues to grow by serving legal professionals at all career and experience levels, including paralegals, legal assistants, legal secretaries, legal support staff, and attorneys with a variety of programs and services:

- Continuing education and professional development through its Continuing Education Programs, Legal Technology Training, and LPI University Multi-week Training Courses
- Certification through the California Certified Legal Secretary (CCLS®) program
- *The Legal Professional* magazine (published quarterly)
- LPI's *Legal Professional's Handbook* (published by The Rutter Group)
- LPI's *Law Office Procedures Manual* (published by The Rutter Group)
- Networking with other legal professionals and legal industry providers/partners
- Membership benefits and discounts
- Legal Professionals, Incorporated, is an approved State Bar of California MCLE provider.

In addition to the above, associations located throughout the state offer monthly educational and professional development programs. Many sponsor lunchtime learning, evening and weekend long educational workshops and webinars.

LPI holds quarterly conferences in May, August, November, and February at various locations throughout the state. Continuing education seminars and workshops are offered at each conference conducted by respected attorneys, judges, and other legal educators. All educational opportunities offered at conferences are also available to attend online. LPI also conducts corporation business during the Board of Governors meetings at the quarterly conferences.

LPI is a volunteer-led organization. From its elected and appointed officers to its committee chairpersons, everything is run by volunteer legal professionals actively working in the legal field and dedicated to providing quality education and training. As LPI celebrates its 90th anniversary in May 2024, it proudly stands as the go-to resource for legal education in California.

Legal Professionals, Incorporated, is transitioning to new management as it seeks to grow the membership, enhance its member service programming, expand its reach, and provide the organization with administrative and association management support.

Visit www.legalprofessionalsinc.org for more information about LPI. Please contact LPI President Rod Cardinale, Jr., at president@legalprofessionalsinc.org with any questions.

Scope of Contracted Work

The following information describes LPI's expectations of the awarded contractor's responsibilities as they relate to providing association management services. The selected contractor will report directly to the LPI President and Executive Committee. The scope of contracted work includes, but is not limited, to:

Corporate Office Presence

- Serve as the LPI corporate office.
- Serve as the keeper of LPI's sales and use permit.

Executive/Administrative Support

- Serve as the LPI Administrator and LPI's primary corporate office contact.
- Receive and distribute all mail/parcels delivered to corporate office.
- Process jewelry orders.
- Provide telephone answering services and direct callers to the appropriate LPI contact.
- Maintain/update LPI storage facility index of contents (dependent on location of Corporate Office).
- Printing/document production services or coordination as needed.
- Maintain internal calendar for LPI corporate office regarding deadlines and tasks applicable to the LPI Administrator and relevant to LPI's operations.
- Manage the content of, and coordinate the printing/ordering of, the LPI rosters.
- Maintain log of time/hours worked by the LPI Administrator/corporate office personnel in support of LPI each month and provide the log to the LPI President and Treasurer.

Communications Support

- Prepare and send out electronic correspondence (emails, eblasts, announcements, etc.) as needed by LPI's leadership.
- Respond to communications/requests from the LPI President, Executive Committee, leadership team, and membership in a timely manner.
- Routinely communicate needs, concerns, important information, etc., to the LPI President and/or other members of the leadership team as appropriate.
- Advise the LPI President in advance of corporate office closure dates, and dates of unavailability of the LPI Administrator.

Membership Management/Support

- Maintain the membership database, including addition of new members, renewals, removal of dropped members, and address/phone/email changes.
- Manage per capita submissions from local associations, reverse per capita reporting to local associations, and coordinate with the LPI Treasurer regarding same.

- Confirm membership status as requested by LPI leadership team and/or the Executive Committee.
- Assemble and distribute new member packets to all associations upon request.
- Manage/update LPI's Constant Contact account.
- Provide monthly reports of membership and other lists as requested by LPI leadership.

Website, Social Media, and Publications

- Together with the LPI Social Media Chair, maintain appropriate databases to ensure that email list and social media accounts are current and accurate.
- Become familiar with LPI's social media platforms, website, and other forms of communication utilized by LPI.

Meeting and Event Management

- Create PDF version of the LPI conference binder for electronic distribution to the membership in advance of each conference.
- Assist the LPI Marketing Chair and Tech Team with logistics and transportation/shipping of marketing and technical equipment for conferences (dependent on corporate office location).
- Assist with promoting conferences and other events.
- Assist conference committee and event participants with registration at conferences at the request of the LPI President.

Financial Services

- Under the direction of the LPI Treasurer, accurately and timely enter financial transactions in LPI's financial software platform.
- Assist the LPI Treasurer and Executive Committee with annual budget preparation.
- Assist the LPI Treasurer as requested with preparation of information for annual tax return and audit.

Response Format and Proposal Instructions

Responses must include the following information, which will serve as the basis for rating qualifications of the individual/firm in this RFP. In the review process, LPI will evaluate proposals based on the information provided in each response.

1. Provide an executive summary of your approach to the contents of the proposal. The summary should provide the LPI Executive Committee with an overall understanding of the proposal and the individual's or firm's approach.
2. Provide evidence of the individual's/firm's ability to provide association management services, including company background and history.
3. Provide the following information:
 - Identify how you will manage, service and support LPI.
 - Describe your individual/firm experience with similar clients/associations, including their approximate budget level.
 - Present a detailed process for your services and how those components will benefit LPI.
4. An outline of the individual/firm's credentials and the professional experience of individual staff members — positions held, past clients, etc. Individuals/firms should include resumes or other descriptions of relevant past experience and qualifications of key individuals who will work with LPI.
5. Individuals/firms must list at least three (3) references for similar work completed in the association management market that includes the following information: company name, address and phone number; contact name, title, e-mail address, and website address (if applicable). LPI may contact the individuals listed to validate the nature of the individual/firm's experience.
6. Fee Structure: Detail the fees associated with providing the detailed Scope of Work and any additional costs that may be associated with fulfilling this scope of work.
7. Individuals/firms may also provide any additional information that may be germane to the proposal and the evaluation of the individual's/firm's experience.

Submission and General Instructions

Individuals and firms responding to this announcement shall submit their proposal by email to LPI President Rod Cardinale, Jr., at president@legalprofessionalsinc.org, no later than 5:00 PM, on May 10, 2024. Late proposals will not be accepted.

Important Dates/Deadlines

Event	Dates/Deadline
RFP Notice Period	April 1, 2024 – May 10, 2024
Deadline to Submit Questions on the RFP	April 20, 2024
Answers to Submitted Questions on the RFP to be Posted	No Later Than April 30, 2024
Proposal Submission Deadline	May 10, 2024, by 5:00 PM
LPI Executive Committee Review of Submissions	May 14, 2024
LPI Executive Committee Selection of Three Finalists	No Later Than June 22, 2024
LPI Board of Governors Approval and Adoption of Contract for New Management	Estimated Date: August 17, 2024
New Management Onboarding	September 3, 2024

All proposals should be submitted in MS Word or PDF format. Submitted proposals should not exceed ten (10) pages in length, inclusive of appendices and other reference material. Resumes of proposed staff members may be submitted separately.

Please note that any additional information, other than the 10-page submission and resumes, will not be reviewed. Font size for basic narrative descriptions must be no smaller than 12-point Arial or Times New Roman font. The subject line should read: “Proposal for Association Management Services.”

Individuals and firms responding to this announcement are strongly encouraged to review LPI’s website to become more familiar with the organization, its mission, activities, and programs.

www.legalprofessionalsinc.org

