Request for Proposals

For Association Administrative & Management Services

RESEARCH ADMINISTRATORS CERTIFICATION COUNCIL
1350 Broadway, Suite 800
New York, New York 10018
History of Organization
The Research Administrators Certification Council (RACC) was formed in 1993 as an independent non-profit organization. RACC is composed of active certified research administrators whose role is to certify that an individual, through experience and testing, has the fundamental knowledge necessary to be a professional research or sponsored programs administrator.

RACC has been providing professional certification in the field of Research Administration (RA) since 1993, with currently more than 3,000 active certificants nationwide. RACC offers three certification examinations: Certified Research Administrator® (CRA®), Certified Financial Research Administrator (CFRA), and Certified Pre-Award Research Administrator (CPRA®).

The purposes of RACC are to:

a) Protect the public interest by maintaining the standards of research administration, which is defined to be the management of activities associated with development, policies, organization, and communications and reporting necessary to obtain support, conduct projects, and meet sponsor and recipient requirements;

b) Determine minimum educational standards for those individuals who seek certification in research administration;

c) Conduct a valid and comprehensive formal examination process for identification and certification of qualified candidates;

d) Grant and issue certificates in research administration to candidates who voluntarily apply for and meet RACC’s requirements for certification; and

e) Protect the public interest by maintaining a registry of individuals holding active and lapsed certificates issued by RACC.

RACC is an all-volunteer organization, with members of the Board of Directors serving in active leadership roles at institutions and organizations across the US.

Mission, Vision, Strategic Plan

Mission – Core Purpose
Certify and uphold Research Administration standards to advance the profession.

Values – Our Aspirations

Visionary leaders
• We are proactive – getting out in front and helping to shape the future
• We are courageous – stepping up to big challenges and making tough choices
• We are strategic – staying focused on highest impact solutions
**Professional integrity**
- We are knowledgeable – driving high standards, products and learning
- We are ethical – serving as the standard bearers for professional excellence
- We are credible – providing thought leadership to advance the profession

**Representational community**
- We are diverse – recruiting and engaging the broad spectrum of Research Administration professionals
- We are relevant – delivering value-added products and services to our customers
- We are adaptable – targeting our products to meet evolving needs

**Vision - Our Picture of the Ideal Future**
RACC is the thought leader...
- RACC produces a relevant, up-to-date, high-value Body of Knowledge
- RACC delivers dynamic, experiential review forums with using exciting new formats
- All institutional decision makers recognize the value of certification
- All Research Administrator job descriptions include a requirement or preferred status for certification
- Robust numbers of applicants are pursuing RACC certifications
- RACC is partnering with international RA organizations to create their certifications
- RACC has a robust infrastructure, sound financial base, and state-of-the-art technology
- RACC Board is widely diverse and includes international representation
  … and serves as a global standard bearer for the Research Administration profession!

**Goals – Our Focus for the Next 5 Years**
Goal 1: Modernize and deliver relevant high-value products and services
Goal 2: Increase visibility and engagement
Goal 3: Define RACC’s role in the international marketspace for Research Administration certification
Goal 4: Expand capacity to support strategic initiatives

**Current Administration & Management Structure**
For the last 27 years, the Professional Testing Corporation (PTC) has been providing RACC’s exam development, exam administration, and database maintenance. In 2006, PTC added administrative and management services to the portfolio of services provided to RACC. During the summer of 2019, PTC made the business decision that their provision of executive director duties (outlined in RACC’s management agreement) would wrap up at the end of 2019. During this time, discussions between PTC and RACC have progressed on how best to move forward with RACC’s own administrative and management service model.
PTC is fully supportive of RACC’s intent to issue the RFP, has been involved in the process and has decided not to submit a proposal under this RFP, based on their earlier business decision. The close relationship between PTC and RACC continues to flourish, grounded in a well-established legacy and vision for the future.

**Summary and Background**
RACC is currently accepting proposals for the administration and management services for the Board of Directors. The purpose of this RFP is to solicit proposals from various organizations and individuals, to conduct a fair and extensive evaluation based on criteria listed herein, and select a candidate who can best provide the services that RACC requires to accomplish its strategic vision. Since RACC is an all-volunteer organization, the administration and management of the organization is beyond the capacity of the Board of Directors. A successful bidder must be prepared to provide a full spectrum of services and be able to operate with minimal supervision.

**Types of Members/Certificants**
RACC may issue certificates to applicants who fulfill the prerequisites for, and receive a passing score on, the certification examination in research administration, and/or who otherwise meet the requirements for certification as may be amended by RACC from time to time.

Recipients of the certificates shall be awarded a designation for use in their signature line and on other business materials, subject to the provisions for use and revocation of certificates set forth in RACC’s bylaws and as the Board otherwise may adopt from time to time.

RACC currently offers three credentialing exams. Detailed information on these exams can be found on the website.

- **Certified Research Administrator ® (CRA®)** was started in 1993 with 10 candidates taking the first exam. There are currently 3,074 certificants that hold the CRA® credential. The CRA® exam averages approximately 490 candidates per year.

- **Certified Pre-Award Research Administrator (CPRA®)** was started in 2011 with 20 candidates taking the first exam. There are currently 134 certificants that hold the CPRA® credential. The CPRA® exam currently averages 26 candidates per year.

- **Certified Financial Research Administrator (CFRA)** was started in 2014 with 20 candidates taking the first exam. There are currently 100 certificants that hold the CFRA credential. The CFRA exam currently averages 40 candidates per year.

**Leadership Structure**

**Board of Directors**
The RACC Board of Directors is a 17 member all volunteer-based board with 15 voting members, one Board Emerita (non-voting position) and one Chair Emerita (honorary, non-
voting position). The membership of the board is diverse in terms of experience, expertise, gender, age and geographical location. Each Director is actively involved in research administration and holds at least one certification from RACC.

**Core Functions**

**Exam Review and Development:** The RACC Board of Directors determines the content of each certification examination through an ongoing process of evaluation. The Board relies on numerous subject matter experts for test development and validation. The subject matter experts must be in current practice as a research or sponsored program administrator, and preferably hold the credential pertinent to the examination under review.

The Board works with PTC for its examination development which also includes online practice tests. This begins with an examination specialist relying on the test content outline and weighting, assembling a draft of each form of the examination while taking into consideration the history of each item’s use, past statistics, equivalency to past forms of the examination, and the comments of previous candidates to specific items. The examination is then reviewed for accuracy, relevancy, and validity by the Board of Directors of the RACC.

Exam Reviews are typically conducted the day prior to the fall meeting of the Board.

**Item Review and Development:** Subject matter experts continually provide updated items for the item banks based on current practices in the field of research administration and assist in review and editing of submitted items.

Item Review sessions are conducted virtually, either through conference calls, live webinars, or other such platforms that will facilitate coordination and discussion.

Item Writing is another critical component of item development. RACC is currently developing procedures to bolster the item writing portion of the item development process.

**Body of Knowledge Review Sessions:** These sessions are typically hosted by an institution that makes the session open to all interested parties, although some sessions are “closed” and available only to employees of the host institution. The Executive Director will be responsible for the following:

- Maintain the point-of-contact with the host institution
- Monitor registration to ensure the session’s feasibility (minimum of 10)
- Assign the RACC Board presenter(s) for the session
- Arrange catering (morning coffee and box lunch) for the session
- Print session booklets and ship to host institution
- Coordinate AV arrangements

**Standing Committees**

**Executive Committee** is composed of the Chair, Vice Chair, Immediate Past Chair, Secretary and Treasurer. The Executive Committee has the authority to carry out the business and
functions of RACC between meetings of the Board, but shall report any such action to the Board for ratification.

The Executive Committee is responsible for preparing a preliminary annual budget. The Executive Committee is also responsible for making recommendations to the Board of Directors concerning the investment of RACC’s funds.

**Nominations Committee** consists of four (4) members of the Board. The Nominations Committee prepares a list of nominees for each office as well as for any vacancies to be created by directors retiring or resigning from the Board. In addition, the Committee shall nominate individuals to fill any vacancies occurring between meetings of the Board. In selecting individuals for nomination, the Nominating Committee shall make an effort to have the Board represent a cross-section of the academic, geographic, and practice interests within research administration.

**Ad Hoc Committees**

**Communications Committee:** This committee oversees all of RACC’s official correspondence, including the monthly newsletter.

**Description of Meetings**

**Regular Meetings:** RACC’s Bylaws state that regular meetings of the Board shall be held at least once in each calendar year at such time and place as shall be determined by the Board. A regular meeting in the months of September, October or November of each calendar year shall be designated as the annual meeting. Currently the Board has four regular meetings per calendar year; two in-person meetings (Spring and Fall) and two conference calls.

**Special Meetings:** Special meetings of the Board may be called by or at the request of the Chair or any four (4) directors. The person or persons calling any special meeting of the Board shall set forth in the notice the purpose, time and place of such special meetings.

**Meeting by Conference Call:** Any action which is required by law, the Articles of Incorporation, or these Bylaws to be taken at a meeting of the Board, or any other action which may be taken at a meeting of the Board, may be taken through the use of a conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such a meeting shall be equivalent to attendance and presence in person at the meeting of the persons so participating.
Executive Committee Meetings by Conference Call: The executive committee has monthly conference calls.

Provider should be able to provide RACC with a dedicated conference line.

Description of Events

Body of Knowledge Review Sessions
RACC conducts approximately 15 Body of Knowledge Review Sessions across the country each year. These sessions are full day events and require at least one BOK presenter for groups less than 15 and two BOK presenters for groups larger than 15.

Exhibit Events:
RACC as part of its marketing efforts, generally will be a vendor at up to 4 professional Research Administration conferences per year. The recommend staffing level for these events is generally two people.

Required Essential Services

General Administration: The Executive Director will respond to correspondence from prospective candidates, certificants, and the public. Correspondence with certificants will include the mailing of certificates to those who have achieved certification. In addition, the Executive Director will participate in all Board, committee, and working group meetings, either in person or via conference call. In addition to maintaining the RACC Policies and Procedures Manual and Bylaws in conjunction with the Board Secretary, the Executive Director will assist the Board in developing and pursing a strategic direction for the organization.

Coordination with Professional Testing Corporation (PTC): PTC provides psychometric services to the RACC Board, including the review of exam questions and the overall development of the three certification exams. PTC also provides, through a subcontract with Prometric, testing locations throughout the country. PTC further administers the process of registration and payments for the exam.

The Executive Director will be the principal point of contact with PTC. The Executive Director will obtain reporting data from PTC regarding the number of persons taking the exam, pass rates, and other demographic and financial information that flows from PTC to the RACC Board in accordance with RACC's contract with PTC. The Executive Director will also, to the extent possible, resolve any routine matters (including but not limited to Handbook proofing and updating; website updating and proofing) regarding RACC and PTC.

Item Reviews: Item Review sessions are conducted virtually, either through conference calls, live webinars, or other such platforms that will facilitate discussion. The Executive Director will work with the Board to identify current certificants who can participate in these sessions and will organize the event; the Executive Director will also coordinate with PTC to ensure that a staff person can be available to provide psychometric
guidance. Maintaining the Item Bank and the Question Bank are the responsibility of PTC, and their representative will conduct the Item Review.

**Exam Reviews:** Exam and Practice Test Reviews are typically conducted the day before the fall meeting of the Board. The Executive Director, working with the Executive Committee, will determine which members of the Board will participate in an Exam Review. The Executive Director will also coordinate with PTC to ensure that a representative is present; the representative of PTC will conduct the Exam Review.

**Board Meeting Administration:** The RACC Board of Directors meets on a semiannual basis, typically in the fall and in the spring, in a city that is determined at the prior meeting. At the conclusion of the board meeting, the Executive Director will publish an online poll to determine date(s) that fit the schedules of the Board members for the next meeting. Working in coordination with the Executive Committee, the Executive Director will determine the specific hotel where the Board will meet and make lodging and conference room arrangements with the hotel. The Executive Director will ensure that all documents, reports, lists of action items, and an agenda for the meeting are available to the Board one week prior to the meeting. The Executive Director will attend all Board meetings.

**Electronic and Printed Materials:** The Executive Director will be responsible for reviewing the RACC website on a regular basis to ensure that materials contained there are current and all links to external sites are functional. Members of the Board will assist in website maintenance. In addition to the RACC website, the Executive Director will assist in the development and maintenance of all printed materials distributed by RACC, including the newsletter, brochures, and handbooks.

**Additional Preferred Services**

**Financial Administration:** The Executive Director will have principal responsibility for monitoring the financial resources of RACC, including ensuring that remittances arrive in a timely manner from PTC and providing financial summaries to the Board Treasurer and to the Board as a whole. The Executive Director will be responsible for ensuring that all financial regulatory documents, including the organization’s annual tax return, are completed and filed in a timely manner. All financial resources of RACC will be maintained in a segregated account that is FDIC insured or otherwise professionally managed.

**Body of Knowledge Review Sessions:** RACC conducts approximately 15 Body of Knowledge Review Sessions across the country each year. These sessions are typically hosted by an institution that makes the session open to all interested parties, although some sessions are “closed” and available only to employees of the host institution. The Executive Director will be responsible for the following:

- Maintain the point-of-contact with the host institution.
- Monitor registration to ensure the session’s feasibility (minimum of 10).
- Assign the RACC Board presenter(s) for the session.
- Arrange catering (morning coffee and box lunch) for the session.
- Print session booklets and ship to host institution.
- Coordinate A/V needs.
- Reserving and making hotel accommodations for the presenters.

Manage, maintain and coordinate RACC’s trademarks, copyrights and legal matters.

Prepare and file all tax filings for RACC.

Promote the mission and strategic plan of RACC.

Assist with the marketing and outreach goals of RACC.

**Oversee Website Design and Maintenance**

**Proposal Guidelines**

This Request for Proposal represents the requirements for an open and competitive process. **Proposals will be accepted until 11:59 pm EST February 17, 2020.** Proposals must be a single file in PDF format and submitted to Shelly Berry Hebb at sberry@tamu.edu. Any proposals received after this date and time will be returned to the sender without review. All proposals must be signed by an official authorized agent or representative of the entity submitting the proposal.

If the entity submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive, including any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organizations to which outsourced items will be contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by the RACC Board of Directors and will include scope, budget, schedule, and other necessary items pertaining to the project.

**Qualifications**

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in professional management and/or administration of non-profit organizations
- List of how many full-time, part-time, and contracted staff are in your organization
- Testimonials from current or past clients
- Anticipated resources you will assign to this project (total number, role, title, experience)
- References
Evaluation Criteria
RACC will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- Overall proposal suitability: proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- Organizational experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Bidders will be evaluated on examples of their work pertaining to association management as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

Contact Information
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Timeline
The following timeline will apply to this process:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
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<tbody>
<tr>
<td>Comment/Question Period:</td>
<td>Now through February 10, 2020</td>
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<tr>
<td>Final receipt of all proposals:</td>
<td>February 17, 2020, 11:59 EST</td>
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<tr>
<td>Initial screening of proposals by search committee:</td>
<td>February 18, 2020</td>
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<tr>
<td>Presentation of finalists to the Board of Directors:</td>
<td>March 2020</td>
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<tr>
<td>Selection and negotiation of contract specifics:</td>
<td>March/April 2020</td>
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<tr>
<td>Formal start date/transition:</td>
<td>Immediately after full contract execution</td>
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If the timeline changes, the Search Committee will issue an amendment to the RFP.

Appendix
Copies of the RACC Bylaws and Policies and Procedures Manual can be provided upon request.