



Request for Proposals (RFP)

Comprehensive Association Management Services

Timeline

RFP Issued: Thursday, January 23, 2025

Deadline for questions: Wednesday, February 5, 2025, at 4:00 pm ET

Deadline for proposals: Friday, February 21, 2025, at 4:00 pm ET

Anticipated decision: April 1, 2025

Email questions and proposals to: Treasurer@cifanet.org

About the Council of Infrastructure Financing Authorities

The Council of Infrastructure Financing Authorities ([CIFA](#)) is a national not-for-profit organization of the Clean Water and Drinking Water State Revolving Funds (SRFs) in all 50 states. The SRFs are state-federal partnerships that provide subsidized loans to utilities and communities to build infrastructure that provides safe drinking water and recycled water, wastewater services, and stormwater management that protects public health and the environment.

CIFA is a member-centric organization that focuses on empowering the SRFs with the knowledge and opportunity to advocate for robust funding, advance fiscally responsible policy, improve programmatic implementation, spur innovation, foster community and grow professionally.

CIFA has three programmatic areas: Advocacy, Professional Development and Member Services.

- The Advocacy Program primarily focuses on monitoring federal legislation, regulation and policy and educating congressional and federal agency staff about the impact of proposed policies. The program includes a one-day policy conference in Washington, D.C. in the Spring. Some direct lobbying is required.
- The Professional Development Program is responsible for organizing an annual three-day training for management and staff of the Clean Water and Drinking Water SRFs, with attendance at the latest conference nearing 500.
- Member Services are an array of traditional association services with a focus on member engagement.

CIFA is a not-for-profit organization, classified by the IRS as a 501(c)6 trade association. Member dues are the primary source of income. CIFA also receives federal funding from a competitive grant for the professional development program from the U.S. Environmental Protection Agency (EPA).

About the Request for Proposals

CIFA is requesting full-service, turn-key association management from independent contractors, with or without subcontractors, and companies. (CIFA doesn't offer full-time employment.)

Professional services needed are:

- I. Strategic Planning
- II. Advocacy
- III. Professional Development
- IV. Member Services
- V. Administration

The term of the contract is April 15, 2025 – June 30, 2026, with the option of renewal on an annual basis.

Questions

Questions about CIFA or the RFP must be emailed to Treasurer@cifanet.org by Wednesday, February 5, 2025, at 4:00 pm ET. Responses to questions will be posted on the website, <https://www.cifanet.org/rfp>, by Monday, February 10, 2025.

Obligation to Award

CIFA is not obligated to award a contract based on submitted proposals. CIFA reserves the right to retain all proposals and to use any ideas in a proposal regardless of whether that proposal is selected. CIFA reserves the right to reject any and all proposals without explanation.

Selection Process

Proposals will be evaluated on three criteria – qualifications (15%), cost (15%), and strategies and deliverables to fulfill the scope of work (70%). A committee comprised of members of CIFA's Board of Directors will select proposals for interviews. Initial interviews will be conducted online between February 26 – March 12, 2025. An in-person interview may also be conducted for finalists. The full board approves the contract.

Minimum Requirements

Proposals may be disqualified for not meeting the following minimum requirements; proposals must:

- Provide the qualifications of individuals who will provide professional services (bios or resumes).
- Designate the individual(s) who will serve as Executive Director, registered lobbyist and spokesperson authorized to speak to the press (may be the same individual).
- Include proposed subcontractors or indicate the intent to subcontract specific services (subcontractors must be approved by the board).
- Indicate familiarity or experience with current platforms or provide suggestions for changing platforms.
- Include a description of how the scope of services will be fulfilled, including specific deliverables where applicable.
- Include the cost of the professional services.
- Be ten pages or less to address scope of services, plus one page for cost. (resumes/bios and examples of work which can be included as addendums).

Current Platforms

Please indicate familiarity or experience with current platforms. If a change of platforms is proposed, please provide details on the benefits and cost of making the change.

- Bookkeeping: Quickbooks Online
- Website Platform: Wix
- Online Registration: Cvent
- Video Storage: Vimeo
- Online Surveys: Survey Monkey
- Electronic Document Storage: Microsoft OneDrive

Scope of Work

The successful candidate will offer strategies and deliverables for providing these professional services. In addition to the expertise and experience in the delivery of these professional services, knowledge of the SRFs and relationships with the SRFs will be considered.

I. Strategic Planning

A. Governance

Facilitate development and revision of written governance policies, such as bylaws, board resolutions and operational procedures, as needed.

B. Sustainability

Facilitate development of strategies to strengthen CIFA's long-term financial sustainability, such as modernizing member dues and identifying other forms of revenue, as needed.

C. Organizational Priorities

Facilitate development of annual organizational priorities.

D. Continuity of Operations

Maintain a plan that allows the operations to be seamlessly transferred to another entity.

E. Brand Management

Undertake a comprehensive review of CIFA's brand, including organizational components (mission, vision, objectives, statement of purpose) and content (logo, website, fact sheets).

F. Board Management

Develop substantive agendas for monthly one-hour meetings of the Board of Directors.

II. Advocacy

A. Policy Agenda

Facilitate development of a policy agenda, which currently focuses on full funding of the SRFs, funding congressional earmarks separately from the SRFs, and streamlining federal requirements on SRF borrowers and programs.

B. Representation and Facilitation

a. Congress

- i. Attend hearings of congressional committees with jurisdiction over the SRFs.

- ii. Develop relationships with staff of congressional committees that have jurisdiction over the SRFs.
 - iii. Facilitate communication and member engagement with staff of committees that have jurisdiction over SRFs.
 - iv. Communicate with congressional staff to advance CIFA's policy agenda.
- b. EPA
 - i. Represent CIFA at EPA meetings and events.
 - ii. Develop relationships with EPA staff that oversee and administer the SRFs.
 - iii. Facilitate communication and member engagement with EPA staff that administer and provide oversight for the SRFs.
- c. Water Community
 - i. Network with organizations and interest groups with a shared interest in water policy.
 - ii. Identify and initiate opportunities to partner with organizations and interest groups to advance CIFA's policy agenda.

C. Federal Legislation

- a. Monitor, evaluate and analyze federal legislation that impacts the SRFs and communicate findings to CIFA's Board of Directors, Committees and members.
- b. Identify, initiate and implement efforts to advance CIFA's policy agenda through legislation, including but not limited to:
 - i. Drafting legislation, congressional testimony, letters, position papers and other content to advance CIFA's policy agenda.
 - ii. Drafting template letters, talking points and other content for CIFA's members to advance CIFA's policy agenda.
 - iii. Developing and managing initiatives, including Save the SRFs and More Protection, Less Process, to advance CIFA's policy agenda.

D. Federal Regulation, Guidance and Policy

- a. Monitor, evaluate and analyze federal regulations, guidance and policies that impact the SRFs, and communicate findings to CIFA's Board of Directors, Committees and members.
- b. Identify, initiate and implement efforts to advance CIFA's policy agenda through regulation, guidance and policy.

E. Policy Conference

- a. Organize an annual conference focused on federal policy and programs in Washington, D.C. in the Spring, including:
 - i. Developing a one-day program of plenary sessions, including selection of topics and speakers.
 - ii. Providing logistical planning, including venue and vendor selection, meal planning, registration and marketing.
 - iii. Providing onsite management for the event.

III. Professional Development Program

A. Annual Training Workshop

- a. Oversee organization of an annual training workshop for the SRFs.
- b. Identify speakers and topics for the program, including development of breakout sessions.
- c. Manage existing subcontractors responsible for program development and event planning.

B. Grant Management

- a. Ensure compliance with terms and conditions for the federal grant, which funds the professional development program.
- b. Prepare federal grant applications to secure funding for the professional development program.

IV. Member Services

A. Communications

- a. Maintain the websites – www.cifanet.org, www.SavetheSRFs.org, and www.moreprotectionlessprocess.org.
- b. Maintain email distribution lists of members and coalition partners.
- c. Communicate regularly with members regarding issues of interest to the SRF community.
- d. Respond to member requests for information.

B. Media Relations

- a. Serve a spokesperson.
- b. Develop and maintain relationships with reporters.

C. Member Engagement

- a. Organize regular meetings of the members, including one in-person meeting in the Spring and an in-person Annual Meeting in the Fall.
- b. Organize regular meetings of committees and other internal groups established by the Board of Directors, which are currently a Policy Committee, Advocacy Team, EPA Engagement and Professional Development Committee.
- c. Facilitate responses to questions from the SRF community.

D. Member Retention and Development

- a. Identify, initiate and implement efforts to retain members.
- b. Identify opportunities to grow membership.

V. Administration

A. Day-to-Day Availability

- a. Be available, generally, Monday through Friday, during traditional business hours (9:00 am – 5:00 pm Eastern time), to attend to CIFA related services and activities.

B. Compliance

- a. File biennial reports in compliance with the District Nonprofit Corporation Act.
- b. File other forms and reports as necessary to maintain compliance with federal, state and local laws.

C. Permanent Record

- a. Maintain a permanent record of documents and official actions.
- b. Maintain a directory of CIFA members and authorized representatives of eligible voting members.

D. Financial Management

- a. Maintain bookkeeping, including:
 - i. Issuing invoices for dues, conference registration and sponsorship and providing necessary follow-up to ensure timely payment.
 - ii. Tracking income and expenses in an online system that is accessible to the Vice President and Treasurer.
 - iii. Reconciling monthly bank statements.
- b. Process requests for payment.
- c. Manage contracts.
- d. Draft quarterly financial reports.
- e. Work with accountants to ensure compliance with Generally Accepted Accounting Principles (GAAP) and to prepare an annual IRS tax return (Form 990).