I. Introduction and Search Overview

Background

The Forum on Education Abroad (hereafter, “The Forum”) is a not-for-profit membership organization established in 2001. The Forum is currently housed at Dickinson College in Carlisle, Pennsylvania, through a strategic partnership agreement. The current CEO and most of the staff reside in Carlisle.

The Forum’s 800 institutional members include U.S. colleges and universities, overseas institutions, consortia, agencies, provider organizations, and foundations. The Forum focuses on developing and implementing standards of good practice, encouraging and supporting research initiatives, and offering educational programs and resources to its members. Its mission is to help improve education abroad programs to benefit the students that participate in them. It is achieving this goal by establishing standards of good practice and quality assurance programs, improving education abroad curricula, and promoting data collection and outcomes assessment, all to advocate for high quality education abroad programs. The Forum is recognized by the U.S. Department of Commerce as the standards setting organization for the field of education abroad. The Forum envisions a future in which education abroad is integral to the mission of higher education, meets the Standards of Good Practice, and is accessible to all students.

Overview of the current position vacancy

In January 2018, the Board of Directors initiated an internal organizational review of the non-profit organization as part of its strategic planning process. During the course of this review, the President and CEO decided to step down to pursue other opportunities. The Board will appoint an Interim Executive Director to implement the recommendations from the organizational review and to prepare the way for a new President and CEO. The Interim Executive Director will not be a candidate for the permanent position and will be a recent retiree from the field of education abroad with significant management experience.

The Board of Directors has appointed an Executive Search Committee to identify and recommend two or three finalists for consideration by the full Board. The organization
seeks to engage its membership base, staff, Board and Council in the development of a new position description that reflects The Forum’s current needs and its vision for the future embodied in the new strategic plan. The successful submitter will have experience leading searches in an empowered stakeholder environment and be capable of working collaboratively with the Board, its Council, its staff and its membership to develop the position description for a new President and CEO.

While the Board retains final decision-making authority, it seeks broad input from the membership through a survey instrument, follow up interviews or other methodology such as may be recommended by the successful submitter. The submitter will draw from the results of this broad membership survey to aid it in developing a position description that reflects the collective voice of The Forum on Education Abroad as it identifies appropriate candidates.

The new President and CEO will initially live and work in Carlisle, Pennsylvania where the organization is located. Significant travel to appropriate industry conferences and member site visits is expected. Before the contract between The Forum on Education Abroad and Dickinson College expires in 2021, the new President and CEO will lead a full, fair and transparent review process in collaboration with the Board of Directors to determine whether to continue with this strategic partnership or to relocate the headquarters of The Forum on Education Abroad.

II. Statement of Work – Executive Search Firm Services

The Forum intends that the successful submitter, once engaged, will conduct preliminary work with the Board of Directors, the Council, the staff, and the membership to build buy-in and to provide input into a position description for the role of President and CEO of The Forum on Education Abroad. The successful submitter will then work with The Forum Executive Search Committee to conduct a focused search for qualified candidates for the position of President and CEO consistent with a search strategy agreed upon with The Forum. It is expected that the search will be national and international in scope. To carry out this objective, The Forum expects that the successful submitter will work in close consultation with The Forum Executive Search Committee of the Board of Directors to:

1. Develop a needs assessment strategy for soliciting feedback from The Forum staff and The Forum membership of over 800 colleges and universities on the desired qualifications and background for a new President and CEO (e.g. questionnaire, follow up interviews).
2. Develop a search strategy.
3. Develop a comprehensive occupational profile for the position.
4. Develop job vacancy notices and place them in appropriate on-line sources and publications.
5. Reach out to potentially appropriate candidates the submitter is already aware of to obtain indications of interest.

6. Evaluate candidates to develop a pool of at least three diverse potential finalist candidates, then thoroughly evaluate potential finalist candidates before presenting them for an interview with the client. Such evaluation is expected to include in-depth interviews in person or by video-conferencing, appropriate preliminary inquiries into references and background, and a careful assessment of the candidates’ strengths and weaknesses against the specification for the proposed position.

7. Conduct, as agreed upon, reference and background checks on finalist candidates.

8. Advise the Board of Directors on the appropriate salary and benefits package based upon an agreed upon methodology and thorough understanding of the organization’s financial position.

9. Advise the chair of the search committee of The Forum promptly and offer alternative courses of action if it becomes apparent that no qualified candidates can be presented, or that the length of the search will differ considerably from that originally specified.

III. Proposal Requirements

Proposals must address the following:

A. Firm and Key Personnel Qualifications

Describe the submitter’s experience and background with searches of this type, including specifically experience with conducting executive searches designed to identify a pool of applicants reflecting racial, ethnic, gender or other diversity. Highlight the breadth of knowledge and experience of the search manager and individual key personnel who will be assigned to the search and the location of their primary place of work. Provide or describe a sample of comparable work completed by the firm.

Provide resumes for the search manager and each of the key personnel identified, describing the individual’s qualifications and experience which make him or her particularly suited for this search. Include relevant education, training and work experience.

B. Statement and Methodology

Describe your understanding of the overall objective and the objectives and deliverables for each Phase of the search. Include a clear description of the work to be performed, the anticipated methodology used to complete the work (including specifically, methodologies for working in close consultation with The Forum Executive Search Committee and the methodology for ensuring a diverse applicant pool) and the
objectives to be reached and/or product to be delivered for each phase of the search. Describe resources and data which may be available to complete the search.

**C. Management**

Provide a work plan and timeline for carrying out the search. Clearly identify the proposed search manager and key personnel. The Proposal must include the labor hours anticipated to complete the search and must demonstrate the Submitter’s ability and willingness to meet the proposed search schedule.

**D. Cost**

Identify the estimated cost and the proposed cost basis to complete the search, including direct and indirect costs and expenses, along with a total estimated cost for the search. Rates, whether fixed or hourly, must include all overhead costs and profit. Costs for subcontractors, if any, must be clearly identified.

**E. Alternatives**

The Proposal may include discussion of alternative tasks or areas of work which the submitter believes will better enable The Forum to reach its objectives for this search. If the Proposal contains any such alternatives, the Proposal must clearly identify the ways in which the proposal would modify the scope of work as presented in this RFP and be clearly identified in the proposed work plan.

**F. Subcontractors**

Identify all subcontractors and subcontract activities proposed to be used. Indicate the specific roles for each subcontractor and provide firm and key personnel qualification and experience information similar to that provided for the Submitter in accordance with Paragraph A of this section.

**G. References**

Provide three (3) recent references concerning your firm’s performance on comparable searches. Indicate the search name, a brief description of the search and the name, title, telephone number and email address of a reference who is knowledgeable about the search and who may be contacted by proposal evaluators.
IV. Evaluation Process and Selection Criteria

A. The Evaluation Process

Written proposals will be reviewed and evaluated in accordance with the criteria set forth below. The Forum reserves the right to conduct interviews with some or all Proposal Submitters before making final award of the contract.

B. The Selection Criteria

a) Firm and Key Personnel Qualifications

The Submitter should demonstrate his/her firm’s experience which qualifies it for the search as well as the breadth of knowledge and experience of the search manager and individual key personnel who will be assigned to the search.

b) Statement and Methodology

A concise search statement must be provided which indicates a clear understanding of the search objectives and deliverables. Response must include a clear description of the work to be performed, the anticipated methodology used to complete the work and the objectives to be reached and/or product to be delivered.

c) Management

The Submitter’s search manager and key personnel must be clearly identified. The response must include the labor hours anticipated to complete the search, and must demonstrate the Submitter’s ability and willingness to meet the proposed search schedule.

d) Cost

The Proposal must identify the hourly rate for the search manager and key personnel and the estimated cost to complete the search, including direct expenses. Clarity of the proposed budget, reasonableness of cost estimates and the relationship of cost to completed deliverables are important elements of this criteria.

C. Contract Award

The Forum reserves the right to award the contract to the submitter with the best overall approach, regardless of cost, or not to award a contract to any submitter.

V. Proposal Format and Administrative Requirements
A. Proposal Format

The Submitter must provide The Forum with 3 hard-copy copies of the Proposal and one additional copy of the proposal must be submitted electronically in PDF format. Double-sided copying and use of recycled paper is encouraged. To the extent possible, Proposals should be prepared on 8 1/2" x 11" paper. Fold-outs for charts, tables and/or spreadsheets are permitted. Proposals must not exceed 20 pages, not including a cover letter, resumes and examples of previous related work.

B. Delivery of Proposals

Proposals (hard copy and electronic PDF) must be received at The Forum offices no later than April 20, 2018. Proposals should be clearly marked as such and should be addressed to the attention of John Lucas, Chair, Forum on Education Abroad Executive Search Committee at the address/email address noted in Paragraph D, below. Hard copies of Proposals may be hand-delivered or delivered by first class or overnight/express mail delivery service, with the electronic PDF copy submitted via email. Proposals submitted by fax are not permitted.

Submitters are solely responsible for ensuring that both hard copy and electronic Proposals are delivered on time. Delays caused by any delivery service will not be grounds for extension of the proposal due date and time. Late received proposals (either the hard copies or the PDF) will be returned unopened to the Submitter.

C. Cost of Proposal

All costs incurred in preparing Proposals shall be borne by the Submitter. Any final contract awarded will not provide for costs of the proposal to the selected Contractor.

D. Communications with The Forum

All communications concerning this RFP must be directed to: executivesearch@forumea.org

E. Miscellaneous

Minor procedural or administrative exceptions to the requirements contained in this RFP may be accepted by The Forum during the proposal review process.

The Forum may disqualify or reject any or all proposals.

The Forum reserves the right to have and retain all original data and working papers generated during the search.