



## **North American Association for Environmental Education**

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### Request for Proposal Membership Management Solution

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**October 28, 2008**

#### **Statement of Confidentiality**

All recipients of this document must treat this Request for Proposal (RFP) as confidential and must not disclose it to any party other than the recipients' employees on a need to know basis, or other individuals authorized under a written Confidential Disclosure Agreement signed by the North American Association for Environmental Education and the recipient. If the recipient does not agree with these provisions, this RFP must be immediately returned and/or destroyed.

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## Introduction

The North American Association for Environmental Education (NAAEE) invites your company to participate in a Request for Proposal process for providing a software solution for managing and advancing the organization's membership services. The purpose of this request is to select the best fit supplier to provide efficient solutions and support to meet the requirements of the Association and Affiliate organizations with the highest level of service at the best value, the highest quality of work, expert support; customer interaction skills, and attention to detail in all aspects of the relationship. All elements are important. The successful supplier must be flexible, creative, and continuously strive to improve services for the Association.

### **The current system in use by NAAEE is failing to meet the business needs of the organization in the following primary areas:**

1. The systems consist of a series of non-interconnected or loosely integrated applications in which the same information is keyed-in manually in some cases or where loose integration impacts usability for staff and members.
2. The user interface is difficult to navigate.
3. The Association finds the cost and process of extending and customizing the system burdensome and is under performing on quality and efficiency for both members and staff.

### **Our primary objectives** in implementing a new Member Management system are as follows:

1. Define a single platform for managing several key components of the Association's day-to-day business. Components such as membership management, event management, contact management, campaign management, email marketing, and targeted, personal communications are all critical to our success.
2. Improve our ability to service our customers by leveraging technology to provide accurate service and cutting edge benefits.
3. A system that can be easily configured to grow and change with the Association's needs.
4. Improve operational efficiencies and quality throughout the organization through improved processes and tools.
5. Support development of a system and vendor solution that can deliver membership management solutions to our State Affiliates.

A careful review and thorough response to this RFP is required for the Association to consider your company for future business needs.

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## Organizational Overview

The North American Association for Environmental Education is the leading Association for environmental education professionals in North America. The Association serves more than 1,500 individual members over 100 organizational members, primarily in the U.S., Canada, and Mexico. Founded in 1970, the Association remains among the most dynamic and respected business organizations working in the environmental education arena. NAAEE's reach literally allows contact with a significant cross-section environmental educators in North America and globally.

The Association helps to grow capacity, quality, and access to environmental education. It helps to grow capacity to conduct environmental education by supporting the professional development of members, providing networking and community building opportunities for members and providing channels through which members can reach out to the community of 7,000 non-members and 1,500 members. NAAEE builds community by giving its members a voice in the growth of the field,

## North American Association for Environmental Education

bringing together groups to address the fields biggest issues, and helping to promote career development and job opportunities.

NAAEE also has Affiliate organizations in over 35 states and provinces at this time. These organizations range in size from very small with 1 employee to organizations that have between 5 and 10 employees. Many of our Affiliates run membership organizations. A goal of this process is that investment by NAAEE can drive down costs, improve access to tools, and improve support available to our Affiliates. All solutions should be conceived with the intent that our Affiliates may adopt these tools and that decisions should be made within the context of driving down costs to implement and maintain these systems for our Affiliates. Also, our Affiliates participate on a Work Group that sets over-all direction for shared technology projects of which this is one.

{Optional: The Association's strategic plan includes four objectives:}

The Association is committed to these objectives. In order to achieve our goals within these objectives, it is imperative that the provider of our Membership Management system develops the solution to deliver systems that enable the Association to implement its objectives.

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## Request for Proposal Overview

The North American Association for Environmental Education is soliciting competitive proposals from software solution providers that have extensive experience in providing Association, membership and/or customer relationship management services.

### Schedule of Events

The schedule of events for this RFP is as follows:

Date	Event
Week of November 23	RFP released
December 15th	RFP question deadline
December 19th, 5pm EST	RFP submission deadline
January 5th	Shortlist selection and notification
Week of January 12th	Interviews with final candidates
Monday, January 26th	Association decision
Monday, February 9th	SOW and contract established
Monday, February 16th	Start of services

### Point of Contact

All communication regarding this RFP should be addressed to:

Contact Person: Paul Nowak  
Email: Paul@naaee.org  
Telephone: (734) 717-9717

Please submit proposal via email to the point of contact above. Please no faxed or mailed proposals. Proposals should be in PDF format if possible. If sending multiple files, a combination of PDF, MS Word, and Excel is acceptable.

## Questions Regarding this RFP

Our intent is to insure that we provide you with all of the information you need to provide the Association the most complete response to this RFP. However, we understand you may have questions or need further direction. We welcome any and all questions you may have. All **questions must be emailed to Paul Nowak at [Paul@naaee.org](mailto:Paul@naaee.org) by Monday, December 15th**. A copy of all questions will be sent to the Association's Work Group as they are received. A response will be prepared by Paul Nowak and returned via email within 24 hours of receiving the question.

## Proposal Review Criteria

Proposals will be reviewed and a decision will be based upon the following criteria:

- Ability to customize to current and future needs
- Level of integration of application with other off the shelf or custom software
- Supplier qualifications, ability, and expertise
- Supplier reliability and availability – time and location
- Scope of service provided – functionality and professional services
- Setup/implementation/transition approach
- Customer reference feedback
- Price

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## Supplier Information

When submitting your response, please provide an overview on the company background, experience, and capabilities. This should include, but is not limited to:

- Years in business and experience providing association, membership and/or customer relationship management services and solutions.
- Background information on the company management team
- A description on the company organization, expertise, and total number of employees.
- An overview of your company's strengths
- A statement of the company's strategic direction for growth in relevant service areas, revenue, and or staffing.
- Provide existing metrics that are used to manage performance (including results), with an emphasis on process improvements
- Describe capabilities to quickly respond to fluctuations in demand (flexible staffing, etc.)
- Industry certifications, credentials, partnerships, etc.
- Your client engagement approach from implementation to ongoing support

As the Association seeks a preferred supplier to provide a critical and strategic software component of their organization business, it encourages prospective suppliers to highlight the following areas within their response:

- Any expertise and experience related specifically to providing solutions to Associations
- The underlying technical architecture by which the solution is developed
- The company's service support structure
- The Association currently uses a custom product for membership (based on PERL + Postgres), OS Commerce for web transactions, Plone for our core website, and All Academic for conference information. All existing data maintained in the current membership system must be transferable to a future system.

Please include any other information about your company that is relevant to this RFP.

## References

The supplier must provide a minimum of three reference accounts at which similar services are currently being managed. One reference should be a new customer established within the last two years. The North American Association for Environmental Education may, with full cooperation of the supplier, consult with the references.

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## Solution Needs (Requirements)

This section outlines in more detail the overall needs the North American Association is seeking in a Membership Management solution. It is broken into three primary areas:

- Functional Needs
- Web Site Needs
- Support Needs

Please be as specific as possible on what your company would provide and those that would not be provided. If there are additional features your solution would provide that are not identified in this section and you believe are of value to the Association in relation to this RFP and their membership management needs, please include.

### Functional Needs

#### Membership Management

At the core of the solution is the Association's ability to manage information related to its members and prospective members.

- Maintain 1500+ memberships
- Members may be single member or organizations/companies with 1+ employees
  - For 1+ employees the system should maintain company profile data and each 1+ company contact data
  - Company profile data includes, but is not limited to:
    - Company Name
    - Street Address
    - State
    - Country
    - Phone & Fax
    - Email & Website address
    - Membership Level
    - Status (Join on Date, Active Status, Prospect, Former Member, other)
    - Picture of Office or Local Area
    - other fields to be identified...
  - Company contact data includes, but is not limited to:
    - Contact Name
    - Address
    - Phone/Fax/Email
    - Title/Position
    - Bio
    - Picture
    - Preferred contact method (Email, Phone, Fax)
    - ...
  - Members may log in via the web site and update any of their company and contact information

## **North American Association for Environmental Education**

- Membership Level Management
  - o Governs member access to premium content and/or services pertaining to their respective membership level
- On line Membership Application
  - o Maintain online membership application page, including online payment of dues
  - o Allow one time or automated recurring dues payment
  - o Allow payments by Credit Card, Bank account EFT, or PayPal
- Membership Renewal
  - o Automatically track renewals – send reminders based upon a given day range
  - o Members pays dues and renew online
  - o Automatically setup lapsed members to lose privileges to members access only pages (or membership level content)
- Searchable Member directory
  - o Ability to search for members by the following field (but is not limited to):
    - Name
    - Address
    - Contact
    - Level
    - Status
    - Group / Committee
    - Keyword
  - o Ability to search by ‘word matching’ for each required field (i.e. Assoc would provide a result containing Association)
  - o Quick search and advance search features
    - Save Search

## **Contact Management (CRM-like Features)**

- Ability to track all contact activities with members
- Data includes, but is not limited to:
  - o Contact Type – drop down select (Email, Phone, Visit)
  - o Location – member site, association, other
  - o Date
  - o Time
  - o Status (Done, Scheduled, Canceled)
  - o Duration of contact
  - o Prep time required
  - o Travel Time
  - o Miles traveled
  - o Notes
  - o Participants
    - Association staff
    - Members
    - Others
- Assign tasks to Association staff based upon contact
- Service(s) provided (research, project, information, etc)
- Ability to send an entire contact event via email
- Ability to track member referrals
- E-mail members referral notices
- Ability to rotate referrals
- Reporting features for referrals

**Event Management (for NAAEE's Conference and NAAEE-Sponsored Events)**

- Event calendar – unlimited number of events
- Automatic event notification to members – initial and reminders – link directly to event
- Online event registration with customizable receipts and payments
- Online list of event registrations
  - o ICS integration for desktop calendars
- Set event registration participant limits
- Attendance tracking
- Label making
- Survey follow-up
- Categorize / Group event (i.e. Education Series)
- Integrates with payment options

**Group, Committee, Council, and Commission Management**

- Define groups & committees. Data includes but is not limited to:
  - o Name
  - o Purpose
  - o Type
  - o Chairperson(s)
  - o Term (Date of existence)
- Associate any member or Association staff to group/committee
  - o Identify role (i.e. Chairperson, director, secretary, etc.)
- Allow member to view what groups & committees they are associated to and have access to other committee members contact information (i.e. Name, Phone, email, bio, etc.)
- Enable certain Group and Committee information to populate public web pages (name of group, chairperson name, number of members, how to join, etc.)
- **Task Management for Groups and Committees**
  - o Define Projects associated to Groups / Committees
  - o Maintain and track tasks associated to group activity
  - o Assign tasks to members or Association staff
  - o Allow members / Association staff to view assigned tasks
  - o Data associated to task includes but is not limited to:
    - Task
    - Owner
    - Start Date
    - Due Date
    - Status
    - Priority
    - % Completed
    - Notes
  - o Ability to import task into Outlook / Evolution / Sunbird
  - o Ability to upload a document associated to a project or task
- Quick search and advance search features for groups and committees
  - o Save Search
- Upload documents (minutes, etc.)

**Campaign Management**

- Targeted Electronic messaging (Email, SMS, FAX) to members based upon defined parameters (groups, membership levels, types, etc)
  - o Based upon preferred contact method
- Track campaign response – click thru response, registration sign-up, attendance.
  - o Campaign result report
- Event driven campaigns

## **North American Association for Environmental Education**

- o New membership welcome
- o Renewal notice
- o Association events (i.e. Annual Conference, voting)
- o Registration reminder
- o Profile update reminder
- o Regular Newsletters
- Save campaigns / Copy campaigns

## **Surveys and Voting**

- Allow surveys of members and non-members with reminders for non-responders
  - o Based upon preferred contact method
- Track response – click thru response, completion response.
  - o Survey result report

## **Financial Management**

- Invoice generation for dues, events, advertising, online/offline product sales, or any other income account
- Track donations, grants, and fund-raising campaigns
- Cash receipts and receivables management system
- Ability to send invoices and payment reminders through email
- EFT Integration
- Credit Card / PayPal
- Integration with QuickBooks, Quickbooks Online

## **Reporting**

- Customized Reporting
  - o Integration with 3<sup>rd</sup> party report writers (i.e. Something like Crystal Reports)
- Export to CVS, Text Delimiter, or PDF format
- Specific reports include, but are not limited to:
  - o Event Registrants Lists
  - o Frequency and Demographics tracking of event attendees by member, event and time period
  - o Campaign click-thru reports
  - o Member ship status and renewal period
- Financial reports include but are not limited to:
  - o Accounts Receivable Reports
  - o Posting Journal of Invoice Activity
  - o Daily Cash Report
  - o Members who have dropped and joined during time period

## **System Management**

- Security control over all users of the system
  - o Assign Association staff user roles and rights based upon access to management areas (i.e. event management) and functions within the area (i.e. add, delete, update, view)
  - o Enable/Disable member access
  - o Define password aging policy
- Create user defined security groups/roles
  - o Assign staff member to groups/roles
  - o Assign access levels to groups/roles
    - Users obtain group level rights
    - User level rights override group level rights
  - o Groups / Roles may include, but are not limited to:

## North American Association for Environmental Education

- Association Staff
  - Association Executives
  - Ambassadors
  - Volunteers
  - Interns
  - Board Members
  - Temporary Staff / Contractors
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- Mail merge Add custom field associated to any data entity within the system
    - Define field type
      - Required
      - Text, date, numeric,
      - Drop down, radio button, check box
        - Define values for select field types
  - Schedule data back-ups
  - Data importing (CVS, Text Delimiter, XML)
  - Data Exporting (CVS, Text Delimiter, XML, PDF)
  - Archiving
    - Old campaigns, committees, projects, tasks

## Website Needs

The following are items we would like to accomplish with our website. To what extent can your solutions assist with accommodating these needs?

- RSS Feeds
- Membership login
- Job Posting
- Advertising
- Fine-grained Access Control for editing content
- Reversion control

We are interested in moving away from the Plone CMS to a CMS such as Drupal. We would like these tools to integrate tightly with Drupal. However, our Affiliates will not all be able to adopt Drupal due to existing investments so these tools should be able to integrate with any existing website.

## Support Needs

- 24x7x365

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## Implementation & Transition Approach

What steps will the supplier take to implement their solution and transition from the existing internal solutions? Provide a High level project plan with key milestones. What dependencies will be required by the Association to meet the milestones? What key roles and responsibilities will be required by both parties to meet milestones?

Please explain your change management process and how you manage your proposed scope of work.

## **Pricing**

Companies should provide a pricing quote based upon the solutions and their related services to meet the needs outlined within this RFP. Fix fee, time & materials rates, and potential discounts, based upon contract longevity, should be specifically outlined. Please specify how often you will invoice for services. In addition, please provide any ongoing support costs associated with your solution.

NAAEE is also interested in discussing staged roll-outs such that certain features of the system may not go into production in the initial year of implementation.

Describe how your company reduces/eliminates cost overruns to ensure that the North American Association for Environmental Education is not exposed to surprise billings.

Additional information and discussions can be performed to assist suppliers in developing a pricing quote.

**Please See Appendix Below Covering Items in a Q & A Format for Additional Context**

## Q & A for Additional Information

### Regarding CMS platforms:

Is the Association interested in a completely new interface for managing website content such as regular pages, the main page, and the various web pages on the site?

Yes. We would like to implement a new CMS that is more tightly integrated with our membership management and event management systems.

Do Committees or Committee Chairs need the capability to edit public or private web pages related to Committee work outputs and coordinating information?

Yes with restrictions on what section of the site they have access to and with staff approval and review of content.

The Association requires a web-based system for maintaining web content. Does this system need to offer revision control? Yes. Workflow? Yes Multiple roles? Yes. Do Committee chairs or other special types of members that are not paid staff have access to segments of the public or private website content? Yes. Do paid staff review such content before it's published? Yes.

One failure point mentioned is that the Association must rely on one vendor for change requests and support. What relationship does the Association prefer to see between the technology provider, access to the system functional modifications, and Association staff?

The Association staff needs more internal flexibility to modify or adapt the system as needed. This does not include major programming changes or modifications to the system, rather customizing fields, reports, etc based on flexibility the system offers. The Association also needs more external responsiveness from our technology vendor regarding change requests.

### Regarding cutting edge benefits and market needs:

Does the Association have survey data that indicates in detailed form what the members expect from the Association and what the members value today or would value in the future from the Association? Yes. What is the process for involving the technology vendor in participating in the process of scoping out, defining, and selecting solutions that will address service and benefit needs and opportunities for existing and new services that do not exist today?

Whatever integration your organization can provide the Association to participate in these needs analysis is of interest. We have already outlined most of our needs and the needs of our members through surveys, focus groups, task forces, staff scenarios, etc. If there is anything further your company can provide to assist in the development of a system to meet these needs should be noted within your proposal.

Does the Association have survey data that indicates member and non-member views, perceptions, and knowledge of the Association itself (what is your brand awareness?) and of specific Association benefits and services? Are specific weaknesses, strengths and/or opportunities identified here? Yes to all of this.

### Regarding advocacy:

## North American Association for Environmental Education

Does the Association operate an advocacy program that requires or allows members to take action regarding specific legislation and/or letter-writing campaigns to elected officials?

Yes. This is a major priority for the Association.

### Regarding local and national partners:

Does the Association partner with local organizations in operational or strategic ways that require data exchange? Yes. Does the Association partner with State-level or National partners that require data exchange? Yes. Does the Association belong to networks of similar organizations that require data exchange or monetary relationships (E.G. Dues sharing)?

Not now but yes in the future.

Will any of these data sharing relationships require further roles to be defined so that the 3rd party may obtain data automatically and on their own, or will access to such reports be controlled by Association staff?

Controlled by Association staff.

### Regarding existing technology:

Does the Association have payment processing tools set up for PayPal? No. A payment gateway such as authorize.net? Yes. Some other 3rd party web-based online payment solution? No. Is PayPal an acceptable gateway to include? Yes.

Does the Association already have a provider for either SMS and/or FAX gateways? No

Does the Association have a jobs posting and notification tool for use by members or the public? Yes, but notification is VIA Listserv. Does the Association have similar tools for events, news, or other community content? Yes. Should new job postings, as an example, be the type of content that a Association member could choose (select VIA on-line form when logged in) to get VIA email or other electronic notification service? YES - these are all services we must have available through this new system.

Does the Association operate any type of training or professional development program with certification tracking or other credential tracking? Yes. Is such program in partnership with a National organization or multiple organizations? In Partnership with Affiliates.

Does the Association have an existing platform for Donation and Planned giving administration? No - but this is needed.

When the RFP mentions 'label making' under Event Management - is printing of labels managed in-house or by a local 3rd party provider? In-House

Does the Association run any member-to-member discount or promotions program that require data management or web-content management? No.

Does the Association identify specific services that are expensive and produce limited value and that have therefore been scaled back or re-oriented in the past three years? Our

**North American Association for Environmental Education**

service mix will change based on this type of analysis which is why we need flexibility in our systems.

Similarly, does the Association have any specific services or products that they do not wish to offer for sale via the web? **No. Everything we sell can be bought online.**