



Request for Proposal (RFP) – Association Management Software

Project Name:	Association Management Software Implementation
Company Name:	Washington State Association of Counties
Address:	206 Tenth Avenue, SE Olympia, WA 98501
Procurement Contact Person:	Mitch Netzer
Telephone Number of PCP:	360.485.8549
Email Address of PCP:	mnetzer@wsac.org
Key Dates:	RFP Opens March 1, 2023 RFP Closes March 31, 2023 Bidders Conference March 14, 2023 Interviews/Software Demos April 17 – 21, 2023 Final Selection and Contract Negotiations April 24-28, 2023 Contract Start May 1, 2023

1. Background/Introduction

Created in 1906, the Washington State Association of Counties (WSAC) is a voluntary, non-profit association serving all of Washington's 39 counties. WSAC members include elected county commissioners, council members, and executives.

The Association provides a variety of services to its member counties, including advocacy, training, workshops, and a forum to network and share best practices. The Association also serves as an umbrella for affiliate organizations representing county road engineers, local public health officials, county administrators, emergency managers, county human service administrators, solid waste managers, clerks of county boards, and others.

WSAC is seeking proposals for implementing a new association management software system (AMS) to merge and manage its multiple databases to allow for ease of member management, communications, reporting, engagement tracking, learning, and other resources.

We currently use the following software, which we are looking to either replace within an AMS or integrate, depending on functionality and price.

- Communications/Marketing: Microsoft Outlook, MailChimp, Website (WordPress platform)
- Event Management: Aventri/Stova, Whova, PayPal
- Learning Management: LearnDash, Vimeo, (certification and non-certified programming)
- Other: JotForm, Google Sheets, Doodle Poll, Survey Monkey, and others.

- Financial: MIP Abila Fund Accounting (Not looking to replace, only provide import/export, reporting cross functions)

We will use this AMS system for not only WSAC membership, but memberships of the Washington State Association of County Engineers, Washington State Association of Local Public Health Officials, Washington Counties Administration Association, Washington Association of County Solid Waste Managers, and several other smaller affiliate groups of county leaders. We will also use this system to manage our Business Partners, Lobbyists, and other state agency stakeholders. We anticipate our database to have approximately 5,000 members.

2. Project Goals and Scope of Services

We are seeking a vendor to provide an AMS that will support our membership and outreach efforts, streamline our processes, and provide our staff with a modern, customizable, efficient, and easy-to-use system.

The ideal solution should include, but is not limited to, the following features:

1. **Membership Management:** The ability to manage multiple layers of member profiles, renewal and payment status, category tags, and other data. Counties pay for memberships, with automatic renewal at the beginning of each calendar year.
2. **Event Management:** Managing events, registration, and payment processing. Including vendor and sponsor management and budgets. Must have a mobile event app, and the ability to engage and interact with attendees.
3. **Communications:** The ability to send bulk email communications and text messages to members. Integrating a mobile app is highly desired.
4. **Reporting:** The ability to generate reports on membership, engagement, committee assignments, learning, and event data. Engagement metrics for members should include meeting, conference, and event attendance, committee assignments, media interaction, and overall member engagement metrics.
5. **Surveys:** Building and distribution of surveys to collect data.
6. **Learning:** Hosting and tracking an online learning platform that can manage modules, knowledge checks, and tracking certifications with both open and password-protected sections for multiple learning tracks.
7. **Resources:** Provide a portal for resources and documents for members and non-members to access online.
8. **User-Friendly Interface:** A modern and user-friendly interface that is easy for staff and members. Ability to assign permissions and delegate responsibilities to members for self-updating of information. We are not currently looking for a platform for members to engage and communicate with each other because of public records act requirements. You may include information on your software's ability to do this or recommendations on a solution that fits our need for archiving and retrieving communication.
9. **Recruitments:** Ability to recruit for Board positions from the nomination process to secure online balloting and voting. Also, for nominations to statewide Boards and Commissions or other national-level positions as needed throughout the year.

10. **Integration:** The ability to integrate with other systems, such as a website, payment gateway, and accounting software (the ability to work with Microsoft Office 365 is preferred).
11. **Data Security:** The ability to ensure data privacy and security.

3. Pre-Proposal Meeting and Questions

WSAC staff will be available for a pre-proposal webinar meeting on March 14th at 1:00pm. To facilitate a timely response to questions at the pre-proposal meeting, we encourage prospective contractors to submit any questions in writing no later than 5 days before your scheduled appointment. All questions and requests for an invitation to the webinar may be submitted to the following email address:

mnetzer@wsac.org

Subject Line: AMS Pre-Proposal Meeting Request

Responses to questions will be posted on our website within 5 business days of the meeting. Additional questions may be sent in to the email address listed above through March 20th. The website will be updated through March 24th will responses.

4. Anticipated Selection Schedule

A diverse stakeholder committee will oversee and direct the project, including the contractor selection process.

The stakeholder committee will review the proposals and schedule hybrid or in-person interviews with each qualified responding firm. Interviews and demos will take place the week of April 17, 2023. After the initial interviews, the stakeholder committee may recommend the selection of a firm or may schedule subsequent interviews.

Final selection is anticipated no later than May 1, 2023.

5. Time and Place of Submission of Proposals

All submissions related to this RFP must be submitted by March 31, 2023, at 5:00 pm PST.

Submissions must be sent via email in .pdf format to the following email address:

mnetzer@wsac.org

Subject Line: AMS Proposal - <Company Name>

All submissions must be received no later than the date and time listed above to be considered responsive.

6. Timeline

The anticipated completion date for this project is September 1, 2023, or sooner. However, we are open to negotiation for the right candidate firm. WSAC and the selected firm will agree to a schedule prior to the commencement of the work.

7. Elements of Proposal

All submissions must meet the requirements of this section to be considered. The response to this RFP must be complete. **Partial or incomplete responses will not be considered.** Responses should be concise, clear, and relevant. Submittals must be on standard letter-size paper, and pages must be numbered.

A submission must, at a minimum, include the following elements in the following order:

1. A letter of interest summarizing the proposer's relevant qualifications and experience in implementing Association Management Systems for Government-focused, membership Non-profit Organizations.
2. Bios or resumes of key personnel who will be involved in the project.
3. Describe the process of how you will review our existing setup and provide solutions for integration with, or replacement of current software. A list of software we currently use can be found here (*this list is not extensive*):
 - a. Microsoft 365 and Exchange
 - b. MailChimp
 - c. WordPress
 - d. LearnDash (LMS WordPress Plugin)
 - e. Aventri
 - f. Whova
 - g. Abila MIP Fund Accounting
 - h. JotForm
4. Provide details on how your software addresses each element in our project goals and scope of work.
5. Provide any other information you believe is relevant to this project or recommendations for other aspects of your software that may enhance our overall effectiveness and quality of membership management that we did not request in the project scope.
6. Provide information on any outstanding characteristics or qualifications that highlight your abilities to uniquely address the type and size of our organization.
7. Provide a list of at least three (3) projects demonstrating your experience implementing an Association Management System similar to the scope as described in Section 2 of this RFP. In addition to the list, provide the following information for each project:
 - a. Description of the project scope. Highlight the areas of significant impact and efficiencies realized by each project based on the abilities of your software. Include project size.
 - b. Contacts/references for the project, including name, organization, address, phone number, and email address.
 - c. Provide a statement of the project's relevance to the goals and scope of services requested in this RFP.
8. Outline the recommended staff training process of the software and other tools available for ongoing training of the program.
9. Provide details on the ongoing tech support and maintenance of the software.
10. Additional information and backup detail should be included as appropriate with your proposal.
11. Proposed schedule for project activities from point of contracting through completion.

12. Detailed fee proposal to include specific line items and the related cost. Include detail on what the core software includes and costs, with clarification on what add-ons are needed and the associated costs of each. Differentiate between setup costs and ongoing support, licensing, or subscription costs.

A table of contents with corresponding tabs should be included to identify each section. WSAC reserves the right to reject any or all proposals and/or to waive technicalities and informalities at the sole discretion of WSAC.

8. Budget

The budget range for this project is between \$50,000 to \$75,000, depending on the ability of the software to replace other current software subscriptions and the ability to meet the needs and timeline of our proposal. We are open to negotiating budget strategies that reduce the initial cost of implementation. We are not seeking financing for the project.

9. Evaluation Criteria

The successful firm will (in no particular order):

- Have a strong history of providing services with evidence of continued growth and enhancements of products to address consumer needs;
- Possess the education, experience, knowledge, skills, and qualifications necessary to complete the project goals;
- Demonstrate expertise and experience in database development and maintenance.
- Demonstrate knowledge and experience in project management.
- Demonstrate expertise and experience in API coding and other “webhooks.”
- Possess the ability to work productively with a diverse group of stakeholders;
- Possess the ability to train WSAC staff on the in-depth use of the AMS.
- Provide a competitive cost of services.

10. Miscellaneous

This RFP is not an offer of work; it does not commit WSAC to fund any proposals submitted, nor is WSAC liable for any costs incurred in the preparation or research of proposals. Submittal of a proposal does not constitute a contract with WSAC. The contract award will not be final until WSAC and the successful proposer has executed a mutually satisfactory contractual agreement. WSAC reserves the right to offer an award to the next highest-rated proposal if a contract cannot be successfully negotiated or to renegotiate or reissue an RFP.

Responders to the RFP will be notified via email upon the successful selection of a proposal. Any concerns or appeals of the decision must be made in writing within 7 days of notification of selection to the procurement contact person.