

Introduction

Women in Planning and Development (WP+D) is seeking an experienced and qualified consultant to provide web-integrated membership management solutions in order to advance the organization's membership services. The purpose of this request is to select a consultant with the highest level of service, quality of work, at the best value. The successful consultant will have superb client interaction skills and attention to detail in all aspects of the relationship.

Issue Areas

Because WP+D lacks a physical office, all administrative functions occur remotely using available, low-cost technology. As a result, the current membership management system consists of several loosely-integrated functions and processes that often involve manually entering the same data more than once. These inefficiencies are burdensome for an all-volunteer organization and adversely impact the quality and effectiveness of a professional membership organization.

WP+D has an existing website at www.wpdchicago.com that was created in 2007 and uses Google Checkout to handle all online transactions.

WP+D's primary objectives for a membership management system are as follows:

1. Streamline the organization's membership management with a simplified platform for managing multiple membership operations, such as membership data management, event management, Google Checkout transactions, email marketing with Constant Contact, and contacts management.
2. Implement up-to-date technology and leverage social media resources to provide accurate and innovative services to our members.
3. Provide a system that will allow flexibility for growth and change depending on the current and future needs of the organization.
4. Provide a system that will allow for a "members-only" interface and ability to manage one's own WP+D membership account.
5. Provide a system that is accessible to multiple back-end users (administrative) with varied technological competencies, and conducive to the operations of a non-profit, all-volunteer organization with limited resources.

Organizational Background

Founded in 1992, Women in Planning + Development (WP+D) is a non-profit, 501(c)(6) organization which offers a unique forum for women to expand their professional skills, network, and exchange ideas while contributing to the improvement and development of Chicagoland. Our members represent over 60 public, private, and non-profit sector organizations providing a wide range of services including urban and transportation planning and design, affordable housing, architecture and landscape architecture, construction management, community and economic development, education, government, and real estate law.

WP+D currently has 108 active members and 193 inactive/expired membership. There are three levels of membership: Student, Professional, and Sustaining. Members can participate in any of the five committees:

- **Community Outreach** coordinates service projects for WP+D members. The Outreach committee takes pride in offering our members the opportunity to connect with other community organizations in revitalizing neighborhoods.
- **Marketing Committee** helps promote WP+D through well-designed, streamlined communication.
- **Membership** works in cooperation with other WP+D committees and is responsible for increasing the number of members and ensuring the retention of these members by making recommendations to the Board on benefits and programs that meet their professional and networking needs. The Membership committee manages the membership database and website content, publishes the Membership Directory, and organizes the Annual Membership Appreciation Picnic in the summer.
- **Professional Development** organizes skills-oriented workshops including the annual spring/fall Professional Development Series.
- **Programs Committee** is dedicated to planning events to encourage social interactions and educational opportunities to our members of all professional levels. This committee plans WP+Drinks, which is a monthly happy hour for members to rekindle relationships in a friendly and casual setting. Other events include the annual holiday party, networking events, and a book club.

Recently, WP+D has taken advantage of the growing numbers of professionals using LinkedIn and created a LinkedIn group to publicize job openings and events to WP+D members with positive results. There are currently 90 members in the WP+D LinkedIn group.

Request for Proposal Information

The RFP schedule is as follows:

Release of Proposal:	Week of March 1, 2010
Deadline for Questions:	March 14, 2010
Deadline for Submission:	March 21, 2010
WP+D Board Discussion:	March 25, 2010
Notification of Final Candidates and Interviews:	Starting week of March 29, 2010
Board Final Selection:	April 22, 2010
Scope of Work and Contract:	May 1, 2010
Start of Services:	May 7, 2010

Note: WP+D reserves the right, at its discretion, to adjust this schedule as it deems necessary. WP+D will communicate any adjustment to the schedule to potential respondents.

Proposals must be submitted electronically as a PDF to:

Contact: Pia Hermoso Heslip
Email: wpdchicago@gmail.com
Phone: 773-573-4805

Please submit the proposal to the email address above with the subject heading "WP+D RFP Submission" no later than **5:00 pm CST on March 21, 2010**. Questions regarding this RFP must be emailed to wpdchicago@gmail.com no later than **March 14, 2010**.

Proposals will be reviewed based on the following criteria:

- Flexibility and ability customize according to current and future needs
- Integration of membership management with website functions
- Experience and qualifications of the consultant
- Availability and reliability of the consultant
- Price

Submittal Information

Proposals should include the following information:

- Company background, experience, and capabilities
- Experience in association and membership management solutions for small non-profits (less than 1,000 members)
- Background information on the project and management team
- Statement on the company's strengths and expertise
- Experience and platforms used for membership management solutions, CMS, and other solutions relevant to the RFP
- Description of your client management approach throughout project implementation and ongoing support
- Other relevant industry certifications and credentials, or notable achievements
- 2-3 references

WP+D relies on Google products in its operations, including Google Checkout, Google Docs, and Gmail. In addition, WP+D recently began using Constant Contact for email marketing campaigns and LinkedIn to connect members. Proposal should explain how these functions can be integrated into the new membership management system. If you are proposing to use different solutions from the above (i.e. PayPal instead of Google Checkout), please explain the added value to the organization and any implications that may arise from such a change (i.e. cost).

Requirements

This section outlines in more detail the overall needs of the organization. Please be specific as possible with your ability to provide services in accordance to the stated requirements.

If there are any features or services that you could provide that are not identified and you believe that they could add value to the organization, please feel free to include. In the event that any portion of the scope proves too costly, or if any features are not compatible, we are flexible to any changes that will make the project more feasible and within budget.

Membership Management

WP+D would like to streamline administrative processes and integrate the website with membership management.

- Able to maintain up to 1,000 members
- Members are able to create profiles that are only visible to other WP+D members that include, but not limited to:
 - Title
 - Name (First, Middle, Last)
 - Company Name
 - Street Address
 - City
 - State
 - Zip
 - Phone and Fax
 - Email and Website Address
 - Membership Level
 - Committees (members can choose 0-5 committees)
 - Status (Joined date, Active/Inactive)
 - Past/upcoming events attended/to be attended
 - Professional Field (Pre-determined categories that member may select)
 - Sub-field
 - Possible LinkedIn feature integration (i.e. profile picture, other members working in the same company, etc.)
 - Ability to create tags (professional and social interests, i.e. *real estate, golf*)
 - Other fields to be identified
- Ability to choose which parts of profile are visible to other members
- Members may log in via the website and access premium content, update their profile and any contact information
 - Premium content to include, but not limited to:
 - Job postings
 - Events for members only
 - Discussion boards
 - Membership directory and other member information
- Membership renewal
 - Automatically track renewals and send reminders using the following schedule:
 - Renewal reminder – 6 weeks before expiration
 - Expiration reminder – 3 weeks before expiration
 - Notice of membership expiration – expiration date
 - Members renew/sign-up online and pay dues online using Google Checkout
 - Lapsed members are automatically denied access to premium content
- Searchable membership directory
 - Ability to search members by the following fields, but not limited to:
 - Name
 - Company
 - Membership level
 - Committee
 - Professional field
 - Keywords and tags
 - Quick search and advance search functions
 - Ability to generate PDF directory of membership database in a printable report format

Contact and Events Management

WP+D would like an efficient system to manage membership information, track contact activities with members, and generate customizable contacts databases for various email marketing campaigns and events attendance.

- Ability to define member groupings based on the following, but not limited to:
 - Name
 - Committee
 - Events sign-up or attended
 - Membership level
 - Status
 - Current/Past Board members/ Committee Chairs
- Ability to track and contact member referrals
- Integration with Constant Contact email marketing program
- Online event registration and dues payment linked to member profiles
- Ability to support event registration for both members and non-members for events open to the public
- Integration of dues payment with Google Checkout
- Track attendance and RSVP counts
- Ability to export customized reports as comma/text delimited, Excel-compatible files, and PDF including, but not limited to:
 - Event registration lists
 - Status
 - Membership Level
 - Committees
- Ability to enable/disable member access
- Ability to manage password/login issues
- Data import and export (Comma/text delimited, Excel)

Website Management

Because WP+D is an all volunteer organization with no physical office, key day-to-day operations such as managing membership activities needs are often handled remotely. Therefore, it is crucial that membership management system requirements detailed above are integrated within the website. The following features are important features to the website:

- Content Management System (All content to be provided by WP+D)
- Membership log in
- Social media features such as LinkedIn, YouTube, RSS
- Ability to add new pages and feature dynamic content (i.e. swapping photos when page reloads)
- Public, Private (Members only), Administrative sections

There are approximately 10 pages in the current WP+D website with additional pages typically added for any upcoming events. Currently, all content is visible to the public. For the new website, we offer the following estimates of the number of pages needed for each access level:

- **Possible Public Pages (approximately 12+ pages)**
 - Home (1)- wpdchicago.com/index.htm
 - About Us (1) - wpdchicago.com/aboutus.htm

- Membership (1) – wpdchicago.com/membership.htm
- Membership Application (1) - wpdchicago.com/membership_application.htm
- Membership Dues (1) (only after online form is submitted)
wpdchicago.com/thankyou.htm
- Calendar (1+) (indicate open or members only events) -
wpdchicago.com/calendar.html
 - Events-specific pages created as needed (i.e. WP+Drinks, workshops, etc.)
- Committee descriptions (1+) - wpdchicago.com/committees.htm
 - Each WP+D Committee (5+) to have its own home page with limited public access (i.e. Committee descriptions and recap of past events available to public but Committee minutes and other news available only to members)
- **Possible Private (Members only) Pages (approximately 7+ pages)**
 - Member welcome/start page
 - Job postings
 - Discussion board
 - Member search and directory
 - Member Profiles/Account
 - Members' Calendar/Events management
 - Membership Renewal
- **Possible Administrative (WP+D Officers/Board only) Pages (approximately 2+ pages)**
 - Admin welcome/start page
 - CMS Interface
 - Similar access to Members Only and Public pages but with administrative/editing privileges

We are considering keeping the current layout of the website but would like proposals to include pricing options for re-skinning versus a redesign.

Ongoing Support

WP+D may require technology support and training especially in the beginning of implementation as well as ongoing support for any future needs. Please explain your approach regarding providing support services for the organization.

Timeframe

We estimate that completion of a project of this scope and size should take between 1-3 months. Please detail your approach in managing and implementing a project of this scope and size as well as any roles and responsibilities required by all parties. Include key milestones and steps within your process, including training and any testing. This will be especially important if your proposal requires a longer timeframe. WP+D is open to discuss phased implementation of certain features of the membership management system.

Pricing

Please provide a detailed pricing quote based on the requirements outlined in this RFP, including a not-to-exceed cost for this project and an hourly rate for any small scope additions. Also, please specify any fees related to ongoing support.