Requestion for Quotation

Response

**Integrated Membership Management**



Apple and Pear Australia Limited (APAL)

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North Melbourne, VIC, 3051

25 November 2014

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# About this document

This document is provided as the Request for Quotation (RFQ) response format associated with the Integrated Membership Management that will be run by Apple and Pear Australia Limited (APAL).

Do not respond to this document before you have thoroughly read and understood the associated Request for Quotation (RFQ) document.

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# Your RFQ Response

## About your organisation

Please provide a brief overview of your organisation covering its history, current and high profile projects, locations and any other information you feel it relevant. This is provided for information only, there will be further opportunity to present your organisations credentials in the next step.

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## Introduce your team

Please list your key team members including identifying those that would be involved with the project and their roles.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Position | Project Role | Contact details | Comments |
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## Additional notes & credentials

Please provide any additional information that you feel will best present your case for winning the selection process and delivering our project.

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## Reference projects

Please provide a list of (up to five) similar projects that we can review as a reference to get a better understanding of your work and outcomes.

|  |  |  |
| --- | --- | --- |
| Project name | Client name | Notes & Comments |
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## Your referees, references clients or sites

Please provide three references that we may contact to ask about their experience with your products and service. Please ensure that each person is informed that we may be contacting them.

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| --- | --- | --- |
| Client name | Contact name | Preferred contact method |
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# Features and functions compliance

Please complete the table below indicating if your system provides the features and functions that we require.

**Fully Scoped Functional areas are as below:**

Contact Database  
  
In almost all membership system builds, whether on or off line, the contact database is a central feature. It is mandatory to the implementation of a working membership system.  
  
 Your contact database records information on all of your constituency, independent of their relationship to your organisation. These attributes (for example, subscriber, current member, committee member) all refer back to the central contact database.  
  
 A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Contact database features include:  
 - Adding new contact details  
 - Managing and editing contacts and status  
 - Manage access and user permissions  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Contact Database can include both member and non-member details | Mandatory |  |  |  |  |
| The data that needs to be stored for each contact can be configured | Mandatory |  |  |  |  |
| The Contact Database provides multiple levels of hierarchy e.g. Organisation, Division, Contact | Mandatory |  |  |  |  |
| The Contact Database can be searched, filtered and segmented in a number of different ways | Mandatory |  |  |  |  |
| Via the Contact Database a person\'s complete relationship with the organisation can be viewed e.g. membership(s), event registrations, online store purchases, email communications | Important |  |  |  |  |
| Subsets of the Contact Database can be exported for use externally | Mandatory |  |  |  |  |

Any notes or comments

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Membership management  
  
Members are the lifeblood of the organisation, delivering services to them and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.  
  
 The level of functionality required to support the management of your membership data and membership interactions will vary with the complexity of your membership structures and the overall level of automation and interaction you require.  
  
 Closely tracking and growing membership numbers is often a primary goal and key revenue generator, so storing and (quickly and flexibly) accessing information on them is essential.  
  
 Key Membership Management features include:  
 - Membership cycles can be defined (calendar year, pro-rater etc)  
 - Membership levels and pricing can be configured  
 - Membership reporting tools  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Memberships can be processed through a number of different statuses reflecting the organisation\'s administration processes | Important |  |  |  |  |
| A range of membership related reports are available | Important |  |  |  |  |

Any notes or comments

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Membership renewal  
  
Allowing members to renew through your website in a simple and intuitive way will also create significant cost savings.  
  
 It also represents improved service and convenience to many who are happy using the internet to make payments. It allows members to renew any hour of the day or night from anywhere. This convenience can be the difference between the renewal and a lapsed member.   
  
 Key features include:  
 - Automated notifications of membership expiry  
 - Members can modify their membership types, interests and settings  
 - Online payments processed for renewals  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Automated communications to member through renewal workflow are supported -e.g. renewal reminder, renewal acknowledgement | Important |  |  |  |  |

Any notes or comments

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Member Services/benefits  
  
Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.   
  
 Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase the attractiveness of your offerings, enable you to upsell your memberships and encourage members to continue to maintain their membership.   
  
 Key features include:  
  
 - Members can update there own details at any time  
 - Different levels of memberships can have access to different information/services  
 - Non-members (contacts or lapsed members) can also update details  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Members can update there own details at any time | Mandatory |  |  |  |  |
| The details that members can update can be configured to be a subset of total contact database information | Important |  |  |  |  |
| Non-members (contacts or lapsed members) can also update details | Important |  |  |  |  |
| Different levels of memberships can have access to different information/services | Mandatory |  |  |  |  |

Any notes or comments

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Marketing Communications  
  
Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.   
  
 Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
 - Newsletters (as well as notifications to individuals) can be sent from the system  
 - Subsets of database can be chosen based on a range of profile information and/or custom segments  
 - Statistics are available to allow analysis of success of communication  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Different subsets of members can be targeted based on membership type | Important |  |  |  |  |
| Both members can non-members can be targeted | Mandatory |  |  |  |  |
| Subsets of database can be chosen based on a range of profile information and/or custom segments | Mandatory |  |  |  |  |
| Different communications require differently styled email templates | Important |  |  |  |  |
| Statistics are available to allow analysis of success of communication | Mandatory |  |  |  |  |
| Newsletters (as well as notifications to individuals) can be sent from the system | Important |  |  |  |  |

Any notes or comments

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Member Directory  
  
In some cases the publication of certain membership details back to the website is necessary. This often occurs amongst networking groups or where members are organisations and the organisational details are being published.   
  
 These directories or lists can be published publicly or log in only areas. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - Members receive directory listings as part of their membership benefits  
 - Details to be included in the directory can be configured  
 - The member directory can be filtered by a range of custom options  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Members receive directory listings as part of their membership benefits | Important |  |  |  |  |

Any notes or comments

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Events Registration  
  
The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.   
  
 A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - Events can be quickly and easily published onto the website  
 - Members receive different event pricing to non-members  
 - Registrants can purchase tickets to all events in a suite of events or purchase in groups  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Events can be quicklyand easily published onto the website | Important |  |  |  |  |
| Events can be browsed via any number of categories and subcategories e.g. by location, by type of event | Important |  |  |  |  |
| Members receive different event pricing to non-members | Important |  |  |  |  |
| Events can have early bird pricing | Nice to have |  |  |  |  |

Any notes or comments

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Event Administration  
  
The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.   
  
 Key features include:  
  
 - Seating allocation can be done automatically but with manual override as required  
 - Name tags can be automatically generated for event  
 - Follow up emails can be sent to both attendees and non-attendees after event  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| The details to be captured for an event can be configured and presented to the end user in a consistent layout | Nice to have |  |  |  |  |
| Certain types of events can only be attended by members or by certain types of members | Nice to have |  |  |  |  |
| Name tags can be automatically generated for event | Nice to have |  |  |  |  |
| Reminder emails can be sent to registrants prior to event | Nice to have |  |  |  |  |
| Followup emails can be sent to both attendees and non-attendees after event | Nice to have |  |  |  |  |
| Person\'s attendance at an event can be recorded | Nice to have |  |  |  |  |

Any notes or comments

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Order Management  
  
If you require to take online payments you will need also to manage the related orders. These orders might be membership payments, events bookings or product purchases. Each will require actioning and reconciliation. This is therefore an essential feature if payments are to be processed.   
  
 A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - A range of online payment gateways are supported  
 - Orders can be processed through a number of different statuses reflecting your processes  
 - Integration with common accounting packages is available  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| A range of payment methods can be offered | Nice to have |  |  |  |  |

Any notes or comments

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Website Content Management  
  
Websites are a critical channel of communication for Associations. To keep a website up to date, fresh, relevant and attractive to search engines the content on the site should be modified and updated regularly. It is therefore essential that this task can be easily and quickly managed by non-technical personnel.   
  
 A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - All site content can be managed by non-technical administrators  
 - Menu structures and Information Architectures (site maps) can managed  
 - Content approval workflow is supported  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| All site content can be managed by non-technical administrators | Mandatory |  |  |  |  |
| Menu structures and Information Architectures (site maps) can managed | Mandatory |  |  |  |  |
| Version control and archiving of content is available | Nice to have |  |  |  |  |
| Generated site content is search engine friendly | Mandatory |  |  |  |  |

Any notes or comments

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## Response types are:

* **Fully complies:** Your system has a feature that directly meets the stated requirement, and its intended use.
* **Partly complies:** Your system has feature(s) that partly meet the functional requirement, but not entirely.
* **Work around required:** Your system does not have feature(s) that meet the functional requirement, but a simple manual work around could be used.
* **Does not comply:** Your system does not comply and a manual work around is not realistic.

Any other response labels used will be judged 'Does not comply'.

# Process and pricing

## Process and milestones

Please outline your project delivery process, including the primary steps and any dependencies. You may wish to describe the benefits of your process, including why your process is successful and/or matches our timelines and milestones, and how it reduces risk.

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## Pricing

Please outline all cost areas, including (but not limited to):

* Project implementation fees based on requirements provided
* Ongoing fees and maintenance
* Licence fees
* Transaction fees
* Add-on fees
* Third party fees

Please match your fees to the project milestones and deliverables as far as possible. Where a fixed quote cannot be provided please provide an estimate range.

## Project pricing

Please document your quotation for delivery of the platform / solution.

**Fees for services / project delivery**

|  |  |  |
| --- | --- | --- |
| Project phase / milestone | Fee (including tax) | Notes & Comments |
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**Technology / licence fees**

Please document any licence or technology fees that apply.

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| --- | --- | --- |
| Description | Fee | Once off / yearly / monthly |
|  |  |  |
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**Third party fees**

If your solution requires any fees be paid by us to a third party please detail these below.

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| --- | --- | --- |
| Description | Fee | Once off / yearly / monthly |
|  |  |  |
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**Other details**

Please provide any other details regarding pricing please do so below.

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Please also provide the hourly rates for key team members or project roles.

|  |  |  |
| --- | --- | --- |
| Role / name | Rate | Notes |
|  |  |  |
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|  |  |  |
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Please describe your desired payment terms.

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# Authorisation

Please authorise your quote.

By signing below you are submitting your quotation, and saying that it is complete and accurate. You agree that you are committing your organisation to delivering the product and services as documented here and have the authority to do so.

|  |  |
| --- | --- |
| Full Name | Position |
|  |  |