Requestion for Quotation

Response

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25 September 2014

Vivek Mahajan

# About this document

This document is provided as the Request for Quotation (RFQ) response format associated with the dsfdsfds that will be run by dfdsfd.

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 |
| 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 | Nice to have |  |  |  |  |
| 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 Yes No | Nice to have |  |  |  |  |
| ddedsfdsfdsf | Nice to have |  |  |  |  |
| Contact Database can include both member and non-member details | Nice to have |  |  |  |  |

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

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| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Membership pricing can be configured including early bird discounts, joining fee, late fee | Nice to have |  |  |  |  |

Any notes or comments

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Membership Application  
  
Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.  
  
 Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.   
  
 Key Membership Application features are:  
 - Individuals / corporations can apply for membership via the public website  
 - Members can choose applicable options and levels  
 - Communications and payments are handeled by the system  
  
Functional area Line items

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| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Members can elect to include optional extras to their application e.g. sign up for Special Interest Groups | Nice to have |  |  |  |  |

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 |
| Early Bird renewal pricing is available | Nice to have |  |  |  |  |

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

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| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Members can update there own details at any time | Nice to have |  |  |  |  |

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 | Nice to have |  |  |  |  |

Any notes or comments

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Continuing Professional Development  
  
Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.   
  
 The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. 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:  
  
 - CPD goals and points can be set-up flexibility in the system  
 - Members can be prevented from renewing their membership if CPD goal(s) have not been met  
 - Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition  
  
Functional area Line items

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| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Categories of activities and units awarded can be defined | 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 |
| Menu structures and Information Architectures (site maps) can managed | Nice to have |  |  |  |  |

Any notes or comments

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Online Store  
  
Online stores, or mechanisms to purchase products and resources can drive considerable revenue for Associations. They are also becoming quicker and easier to build into online platforms. In combination with a willingness to purchase online, this means that the ability to generate revenue from selling merchandise and products via your website is becoming increasingly attainable and popular.   
  
 Online stores can range dramatically in complexity and sophistication, so truly specifying and costing this area of functionality can be difficult.   
  
 Key features include:  
  
 - Any number of categories/subcategories of products can be defined  
 - Online payment can be taken flexibly via payment systems  
 - Different shipping methods and pricing can be configured  
  
Functional area Line items

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies | Partly complies | Work around required | Does not comply |
| Details presented about each product can be configured | Nice to have |  |  |  |  |

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.

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| --- | --- | --- |
| Role / name | Rate | Notes |
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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 |
|  |  |