Request for Quotation

**Integrated Membership Management**



Apple and Pear Australia Limited (APAL)

39 O'Connell St

North Melbourne, VIC, 3051

25 November 2014

Sophie Clayton

Table of Contents

Executive summary

Key Objectives

Project Scope

Timeline & milestones

About Integrated Membership Management

Project objectives and benefits

Introduction

Objectives

Fit with organisational goals

Roles and Responsibilities

Project team

Process and timelines

Timeline & milestones

Evaluation criteria

Scope: Features and functions

Functional areas

Features by Functional area

Submitting your response

# Executive summary

## About this document

This document has been created to brief you and your organisation on our upcoming project and to gather detailed information on how your organisation and technology platform can deliver our requirements.

The document contains background information about Apple and Pear Australia Limited (APAL), our mission and the project objectives. It also details the functionality that we wish the project and platform to support.

## Project Scope

The full project scope contains functional areas and features within each of these functional areas. Each of the features can present operational improvements, or benefits to stakeholders. A breakdown of these [features and functions is provided below](#_Scope:_Features_and).

In total there are 93 desired features, broken into 10 Functional areas or groups.

In this project we wish to implement the following high level functional areas:

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  
  
  
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  
  
  
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  
  
  
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  
  
  
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  
  
  
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  
  
  
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  
  
  
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  
  
  
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  
  
  
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

## Project Timeline

The project duration is expected to be **71** days.

* The intended start date is: **28 August 2014**
* The target completion date is: **07 November 2014**

# About Apple and Pear Australia Limited (APAL)

## Our mission

Apple and Pear Australia Limited (APAL) is the peak industry body representing commercial apple and pear growers in Australia. APAL is charged with providing leadership, support and additional resources to drive key industry initiatives, which meet the goals of the industry strategic plan.

## Our short / medium term goals

Includes: - increase membership - communicate more effectively with apple and pear growers - improve industry participation - increase organisational efficiency - provide better services to members, stakeholders, and apple and pear growers - organise our data management and systems for members, contacts, newsletters, web logins, SMS, etc - capture organisational data and share it better across the organisation

# Project objectives and benefits

## Introduction

This section presents the motivations for the project. These include project our objectives, how these fit with our organisational strategy and other benefits.

## The projects contribution to our organisations mission

- better member management will help us communicate more effectively with apple and pear growers to support the industry betterrn

## The projects contribution to our organisations current goals

- streamline our member and contact management - improve communication with members - integrate different software platforms

# Roles and Responsibilities

Successful execution of the project will require the input and participation of a number of team members, these are listed below along with their anticipated roles and responsibilities.

## Our project team

The project team leader is Sophie Clayton.

|  |  |
| --- | --- |
| Team member | Role (title) |
| Sophie Clayton | Project manager |
| Leanne Groves | Strategic adviser - member knowledge |
| Nikita Block | Strategic adviser - current systems and data |

# Process and timelines

We are expecting the project to be delivered during the following period, the project is broken into key milestones shown:

## Timeline & milestones

The project duration is expected to be **71** days.

* The intended start date is: **28 August 2014**
* The target completion date is: **07 November 2014**

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

|  |  |
| --- | --- |
| Milestone name | Date |
| 1: Project Commencement | 28 August 2014 |
| 2: Supplier engaged | 10 September 2014 |
| 3: Scoping and planning complete | 17 September 2014 |
| 4: Interface design complete | 01 October 2014 |
| 5: Development complete | 29 October 2014 |
| 6: User testing complete | 08 October 2014 |
| 7: Training complete and system live | 31 October 2014 |
| 8: Project Completion | 07 November 2014 |

# Evaluation criteria

Your response will be evaluated on the following criteria in priority order:

|  |  |
| --- | --- |
| Evaluation criteria | Weight |
| Match to functional requirements | 40 |
| Value for money | 20 |
| Organisational fit | 5 |
| Team (technical & relationship) | 5 |
| Strength of project process | 5 |
| References (track record) | 5 |
| Referees (your current clients) | 5 |
| Locations and logistics | 5 |
| Warrantees (products & services) | 5 |
| Company history and stability | 5 |

We are following a fair and transparent engagement process, supported by well structured documentation. Please follow this process and do not modify the format of the documentation.

We will not be releasing our individual assessments for each response, however we will be sticking to the assessment mechanism.

# Scope: Features and functions

## Functional areas

This project will see the delivery of 93 features, broken into 10 groups or functional areas. The functional areas are:

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 | We require the ability to add custom fields for contacts/members. |
| 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 |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 | We require membership reports showing number of members, eg by state and what they grow. |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| Automated communications to member through renewal workflow are supported -e.g. renewal reminder, renewal acknowledgement | Important |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 | Ideally we want an integrated service where members and contacts can subscribe to specific services (eg. newsletters, magazine) on the one platform. |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 | Needs to be comparable in capacity to system like MailChimp. |
| Newsletters (as well as notifications to individuals) can be sent from the system | Important | Would be nice to have this embedded in tool OR have capacity to synchronise with them (MailChimp). |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| Members receive directory listings as part of their membership benefits | Important |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| A range of payment methods can be offered | Nice to have |  |

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| 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 |  |

# Submitting your response

Thank you for taking the time to review our Request for Quotation.

We have provided an associated Request for Quotation response document, which contains a structured format for your response.

In the RFQ response we also ask you to provide further background and supporting information about your company and services, as well as how your system matches our functional requirements.

Our cut off date for responses is: $RFQ\_reponse\_date$

Once these responses are submitted we will assess them on their merits and contact vendors with further any questions, or the outcome of our decision.