Questions and Responses

RFP – Integration of a CRM and an AMS for USEA

November 22, 2019

Question: Approximately how many contacts do you anticipate maintaining in the CRM?

We anticipate maintaining a contact database of between 15,000 – 20,000 people that will increase by at least 1,000 per year.

Question: Approximately how many members do you anticipate maintaining in the AMS?

We anticipate maintaining a membership database of between 100 – 200 members.

Question: Please disclose your current CRM and AMS and the primary points of pain with them.

We do not currently use a CRM or AMS.

Question: What level of integration do you need with your existing Drupal website?

Event registrations made through the Drupal-based website should populate into the CRM. AMS should be integrated to allow for online member application and membership dues payment. Member-only content on the website should be referenced against the AMS backend.

Question: Are there other websites/systems to integrate with?

All websites/systems that require interoperability have been described in the request for proposals.

Question: Task 2 of the RFP talks of the integration with MailChimp and with Access and Excel with the focus on input from these integrations. Are these to be considered to be incoming data sources for the initialization of the CRM/AMS, or will they need to provide ongoing updates between all platforms? (Beyond the need for ad-hoc imports/exports.) If the initial source data sources are something other than MailChimp/Access/Excel, please provide details of these data sources.

Ongoing updates between all platforms should be supported.

Question: What level of data security is necessary to maintain?

Personal data of members and the contact database should be secured.

Question: What level of integration is necessary with MailChimp? Simple contact integration or a deeper integration to include data attributes?

Contact integration is the priority.

Question: Is there a preferred hosting solution?

Proposal submissions are free to include suggested or preferred hosting solutions.

Question: Please provide details on the breadth of data to be maintained in the CMS/AMS, beyond contacts and members, such as Events, Fundraising, Sponsorships, Committees.

Data maintained in the AMS should include contacts, members, event attendance, payment status, committee memberships, and organization type.

Question: Please provide an overview of your membership structure (levels, fees, etc)

Membership Dues Structure: Please check the appropriate category listed below. Membership dues can be prorated for organizations joining mid-year. Annual membership invoices are distributed in January each year. Cancellation of membership must be in writing and signed by the voting member. Members cancelling in mid-year are expected to pay prorated dues for that year.

		Prior Year's Revenue (Millions)	Dues
☐	1. Energy Companies, Trade Associations, Manufacturers & Engineering Companies (Membership dues for this category are based on the annual revenue of the organization according to the chart located to the right)	☐ $100+ ☐ $50+ ☐ $10+ ☐ $5+ ☐ Under $5	☐ $5,000 ☐ $4,000 ☐ $3,500 ☐ $2,500 ☐ $2,000
☐	2. Professional Societies, Federal Government Agencies, Professional Service Firms, Universities, Educational Organizations & State Government Agencies	☐ $1,000	

Question: What level of access will members and non-members need access /login to private/restricted functionality/content?

Access privilege should be broken down by at least Administrator, Staff, Member, and Non-Member.

Question: How clean and complete are your data sources for input into the CRM/AMS?

Data sources are clean and complete.

Question: If you considered any CRM and/or AMS package prior to the release of this RFP, please list them with any relevant comments.

We cannot provide this information.

Question: How many organizations are responding to the RFP?

We cannot provide this information.

Question: What components do you wish to be integrated within your Drupal website? Membership data? Organizational directory? Organization profile information? Member profile information? Event information? Other features?

Event registrations made through the Drupal-based website should populate into the CRM. AMS should be integrated to allow for online member application and membership dues payment. Member-only content on the website should be referenced against the AMS backend.

Question: How many organizations are members of USEA? Are employees of these organizations also considered members and receive the same benefits? Is there a limit on how many employees can be associated with an organization?

USEA has over 120 members. Employees of these organizations are considered members and receive the same benefits. There is no limit to the number of employees per member organizations.

Question: Is your membership period based on an annual membership cycle? Can members renew early? Are you interested in recurring memberships? Do members receive membership renewal notices?

Member period is annual. Members can renew early. We would consider automatic renewal. Members currently receive renewal notices and invoices on an annual basis.

Question: What self-service tools do members currently use? When a member logs into the website what information is displayed? Do members have a dashboard? Can members update their own profile information? Can members renew their membership through the website? Is there a member/organizational directory? Are members able to view/download documents?

The first question is unclear. Proposal submissions are free to suggest information that will be displayed to members upon login. Members should have a dashboard. Members should be able to update their own profile information. Members should be able to renew their membership through the website. A public member directory should be available but not provide personal contact information. Members should be able to view and download documents.

Question: Are you using another provider for: Event registration, Fundraising, Documents Storage, Surveys/Forms

No, currently event registration is managed by the Drupal CMS.

Question: What is your database? Is it a proprietary database or through another vendor?

Our database is proprietary.

Question: How are you currently processing payments for membership? If using a 3rd party merchant processor, are you expecting an integration with the new AMS?

We are not currently using a third-party merchant processor.

Question: What is your accounting software? Do you expect to integrate membership information (payments) into your accounting platform for reconciliation?

USEA's proprietary accounting system will not be integrated with the CRM/AMS system.

Question: What are the 2-3 primary drivers which make the CRM/AMS project a priority now?

The need to establish a database, organizational growth, and a desire to better serve our members.

Question: How many participants were invited to respond?

We cannot provide this information.

Question: Appears to be inconsistency if to submit a proposal that we include either a DUNS or SAM number, or if both are required. Please clarify? However, It is clearly stated "Please keep in mind that the winning bidder must have both before the contract is signed."

Winning bidders are required to have both DUNS and SAM numbers. Bids will be considered for organizations who have applied for, but not yet received, DUNS and SAM numbers. However, this must be documented in the proposal and no contract will be awarded until the numbers have been assigned.

Question: While no problem to provide SAM registration details, how would you describe the importance for this project? Is it related to requirements of funding sources?

This is a requirement from our funding sources.

Question: What is/are the current systems for managing member and constituent data? This will help us better understand the migration of current data.

Member data is maintained offline in a Microsoft Access database.

Question: It appears there are approximately 30 staff with USEA. How many will need access to a new system?

All staff should have access to the system. If pricing changes based on number of staff with access, a clear breakdown of per-user costs should be included in the proposal.

Question: Approximately how many organization and individual records are tracked in your current system? (just an order of magnitude is fine)

Over 120 member organizations and over 7,000 individual records of members and non-members. However, this amount does not include thousands more that we would like to integrate into the CRM.

Question: What accounting software is used at USEA? Is there an expectation your CRM/AMS will interact or integrate with you Accounting system?

USEA's proprietary accounting system will not interact or integrate with the CRM/AMS.

Question: While it appears a bulk of USEA revenue comes from Government Grants / Contributions, would it be useful to track grant management in your CRM, or is that handled in an entirely separate system?

That is not required for this project.

Question: What system(s) are used currently for event registration, management and attendee engagement? Would it be advantageous to incorporate this in the AMS/CRM for USEA?

This is currently managed through a Drupal CMS. Proposal submissions are free to suggest alternate event management approaches.

Question: Aside from desired ability to interface with a Drupal Website, and MailChimp, are there any other business systems USEA would like to integrate with or be included in the CRM/AMS?

All business systems envisioned for interoperability with the CRM/AMS are detailed in the request for proposals.

Question: How do member benefits flow down from a member organization to individuals employed or affiliated with the member organization? Is there a difference in flow down between Category 1 and Category 2?

Individual employees and affiliates of a member organization enjoy full membership benefits.

Question: If selected as a finalist, will there be an opportunity to demonstrate our system capabilities to your team either at your office or online?

Shortlisted/finalist candidates can be provided with an opportunity for a demonstration.

Question: Could you help me understand the reason for requiring a DUNS and SAM number?

This is a mandatory standard provision of our funding agencies.

Question: Do you process dues on a cash or accrual basis?

We process dues on a cash basis.

Question: Do you defer income?

We do not defer income.

Question: Do you allow for online membership join and renew?

We would like this to be a part of the new AMS.

Question: Do you sell subscriptions and or publications?

No.