



United States Energy Association

Request for Proposal: Integration of a Customer Relationship Management (CRM) and Association Management System (AMS) for USEA

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## REQUEST FOR PROPOSAL – Integration of a Customer Relationship Management (CRM) and Association Management System (AMS) for USEA

Questions due: November 22, 2019

Closing date of RFP: December 6, 2019

The United States Energy Association (USEA) is inviting prospective organizations or individuals through this Request for Proposal (RFP) to submit proposals for integrating a customized customer relationship management (CRM) and association management system (AMS) for USEA.

Proposals are due by 5:00 PM EST of the closing date. Please submit all proposals with a read receipt to Mr. Jake Swanson, Program Coordinator, at [jswanson@usea.org](mailto:jswanson@usea.org). Proposals must be in digital format (PDF). All bidder details will be kept confidential.

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### I. INTRODUCTION

The U.S. Energy Association (USEA) is the U.S. Member Committee of the World Energy Council (WEC). Headquartered in Washington, DC, USEA is an association of public and private energy-related organizations, corporations, and government agencies. USEA represents the broad interests of the U.S. energy sector by increasing the understanding of energy issues, both domestically and internationally.

USEA's team of international energy specialists work with the U.S. Agency for International Development (USAID) to expand energy infrastructure in developing countries and with the U.S. Department of Energy to advance the policy discussions on advanced fossil technology.

### II. SCOPE OF WORK

**Tasks:** The tasks to be performed by the external CRM/AMS developer ("Developer") under this Scope of Work shall include the following:

#### Task 1: Implementation of CRM/AMS

The Developer will implement a new CRM/AMS for, and under the direction of, USEA.

Key capabilities and features for the new CRM/AMS **that are required** include:

- Ability to integrate with Drupal content management system (CMS) and MailChimp
- Ability to create invoices and receive payment for membership dues
- Ability to create queries and run reports in the CRM
- User-friendly import process for data and contacts from Microsoft Access and Microsoft Excel
- User-friendly export process data and contacts to Microsoft Excel
- Automatic and/or regular updates for the CRM/AMS software

Please list all capabilities and functions for your organization's base-level CRM/AMS package. Additional capabilities and features should be noted in the proposal and if they are an additional cost, that cost should be noted in the detailed budget.

### **Focus Areas for Task 1:**

#### CRM Functionality:

It is critical that USEA has the ability to create queries in the CRM that can easily sort contacts based on tags, affiliation codes, a custom field, or a similar feature. It is also required that USEA has the ability to create custom fields for each contact. The CRM should also include a function where USEA can export contacts and data to Microsoft Excel.

#### AMS Functionality:

The AMS should, at the very minimum, be able to create invoices for membership dues and collect payment from members for dues. The AMS should also be able to track member organizations and create a main point of contact for each organization.

### **Task 2: Integration into the CRM/AMS**

The Developer will integrate existing sites and services utilized by USEA into the CRM/AMS including:

- MailChimp
- Microsoft Access documents
- Microsoft Excel documents

### **Focus Areas for Task 2:**

The CRM/AMS must be able to import contacts from MailChimp and import data from Microsoft Access and Microsoft Excel documents.

### **Task 3: Ongoing CRM/AMS maintenance and training for USEA staff**

Onsite training and continued support will be included to ensure the CRM/AMS will remain functional and fully utilized by USEA staff. Please note online and/or in-person training and support costs if it is not already included in the budget.

### **Focus Areas for Task 3:**

The Developer will, on an ongoing basis, provide CRM/AMS assistance or support, including:

- Streamlining and maintaining connections between the CRM/AMS and other sites and services utilized by USEA (including any CMS, mailing, email, and web services);
- Managing the CRM/AMS updates and maintenance under the direction of USEA; and
- Distributing training manuals or videos to help onboard new USEA staff.

**Schedule:** Tasks 1 and 2 should be completed within 6 months of project launch. Task 3 will continue on an ongoing basis through the life of the agreement with the Developer.

## **III. IMPLEMENTATION AND APPROACH**

The purpose of this RFP is to solicit proposals from various candidate organizations or individuals, to enable USEA to conduct a fair evaluation, and select the organization deemed most suitable to undertake the project.

Subcontract agreement management, oversight, and payment will be carried out by USEA.

#### IV. PROPOSAL CONTENT

The proposal must contain the following:

- a) A cover letter to the proposal, including:
  - A bidder’s Data Universal Numbering System (D-U-N-S) number and proof of a current registration in the System of Award Management (SAM). Proposals without a DUNS number or proof of SAM registration will not be considered. USEA will accept a proposal if it includes proof that the company is in the process of obtaining a DUNS number and SAM registration (see evaluation criteria for more information).
- b) A technical proposal, including:
  - a. Proposed project schedule to perform the tasks under this project;
  - b. Bio sketches of personnel, including at least 1 Developer or Implementer that will be dedicated to the project;
  - c. Summary of relevant experience of each proposed team member for (not beyond) the past 5 years. Relevant experience should be listed chronologically (starting with the most recent). Not to exceed 2 pages for each proposed team member;
  - d. Summary of the work to be performed by each employee proposed for this project.
- c) A financial proposal, including:
  - Detailed budget justification (i.e. line item budget);
  - Labor, other direct costs, indirect costs, and level of effort for each employee proposed for this project.

#### V. EVALUATION CRITERIA

All bidders are required to provide a DUNS number and maintain a current SAM registration. Proposals without a DUNS number or proof of SAM registration will not be considered (see below).

*Note: USEA will accept a proposal if it includes proof that the company is in the process of obtaining a DUNS number and SAM registration. A PDF copy of an email from “notification@sam.gov” to the bidder stating that the bidder “successfully submitted the entity registration for NAME OF COMPANY in the U.S. Government’s System for Award Management (SAM)” will be considered an acceptable proof. Please keep in mind that the winning bidder must have both before the contract is signed.*

Selection of an offer for a subcontract award will be based on an evaluation of proposals against qualifications, subject matter expertise and budget justification. Proposals shall first be evaluated from a technical standpoint (qualifications and subject matter expertise) without regard to proposed budget justification. For those proposals determined to be technically acceptable, budget justification will be evaluated.

Evaluation Criteria:     70%:   Quality/Functionality  
                                  30%:   Cost

#### VI. QUESTIONS AND CLARIFICATIONS

All questions and clarification requests related to this RFP should be submitted via email to Mr. Jake Swanson, Program Coordinator, at [jswanson@usea.org](mailto:jswanson@usea.org) no later than 12:00 PM November 22, 2019. Questions will be answered and posted publicly on the USEA website no later than 5:00 PM EST on November 22, 2019.

END OF RFP