

NCCHCA REQUEST FOR PROPOSAL

Online Membership & Event Management



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SECTION I – INTRODUCTION

This Request for Proposal is an invitation to a select group of companies to submit proposals for a website-integrated membership and event management platform to the **North Carolina Community Health Center Association**. The intent is to obtain information leading to the selection of a supplier that will best meet the event and membership management needs of NCCHCA.

Respondents who are selected for further consideration may be asked to make onsite or virtual demonstrations of their system.

All questions and inquiries regarding this RFP should be directed to:

Josie A. Lane
North Carolina Community Health Center Association
4917 Waters Edge Drive
Raleigh, NC 27606
Email: lanej@ncchca.org

Anticipated Time Frames for Evaluation and Selection Process

Issue RFP to Vendors:	December 31 st 2017
Responses due:	January 31, 2018
Finalists Selected	February 28, 2018
Final Evaluation and Selection	March 30, 2018
Contract Signed	April 15, 2018
Commence Implementation	April 30, 2018

**Please submit electronic copies of your response to the email above.
Responses received after the due date will not be considered.**

SECTION II: NCCHCA AND PROJECT OVERVIEW

1. Overview of the North Carolina Community Health Center Association.

The North Carolina Community Health Center Association (NCCHCA, or “the Association”) was created in 1978 to secure the common mission of Federally Qualified Health Centers (FQHCs) by representing their interests to federal, state, and local agencies and officials. As part of a statewide and national movement to reduce barriers to healthcare, NCCHCA and its members strive to increase access to primary care services. The mission of NCCHCA is to promote and support patient-governed health care organizations and the populations they serve. This is accomplished by providing training and technical assistance in areas such as clinical service delivery, governance, workforce development, and administration. The Association analyzes key issues facing health centers and provides members with critical information in a timely fashion. In addition, the Association helps communities to create new health centers or expand existing ones. For more information regarding NCCHCA's member organizations please visit our website at www.ncchca.org.

2. Project Overview

NCCHCA is seeking to select and implement a flexible, dynamic, and robust system for managing our membership and events. NCCHCA is undergoing a simultaneous review and redesign of the Association website, and the finalist vendors for this project will be asked to demonstrate their systems' capacity for integrated web functionality.

NCCHCA's ever-growing membership is currently comprised of 42 FQHC's (Federally Qualified Health Centers) and look a-likes, and approximately 4,000 individuals. The new member management and event management platform should enhance our capacity to do the following:

1. Create Accounts and allow for account self-creation for different types of users:
 - a. Health Centers
 - b. Individual Members
 - c. Individual Non-Members
 - d. Vendors, Exhibitors
 - e. Partners

2. Communicate with our membership and users via bulk email and newsletters, targeted by:
 - a. Group (opt-ins and special teams/workgroups)
 - b. event attendance
 - c. location
 - d. and other parameters

3. Create Conference and Event Registration pages
 - a. manage sessions
 - b. set event fees
4. Provide Event registration services:
 - a. customizable self-management of registrations
 - b. viewable registration history within profile
 - c. Passwords: self-reset functionality with security questions or similar automated process
5. Customize and carry out financial transactions: invoices, receipts, discount codes, sales, refunds, dues payments, donations
6. Allow members to easily modify their profile pages or the profile page of their Member Center (if they are a permitted user); register for events, and access protected member or group information
7. Create and manage Group Pages (with log in), associated capacity for calendars, resources, and team-specific communications
8. Easily upload, organize, store, and assign access for, resources for our members on login protected pages
9. Create, share, and store membership renewal documents and requests for updated information (*including e-signature capability*)
10. Accommodate growth in membership, data and analysis needs, and increases in staff
11. Collect, manage, graphically represent, and disseminate member data, or allow for integration with software such as Tableau.

SECTION III – VENDOR PROFILE

Include:

1. Company name, address, city, state, zip code, telephone, and fax numbers.
2. Name, title, address, phone and fax numbers, and e-mail address of the primary contact person for this project and project team.

3. Brief overview of your company including number of years in business, number of employees, nature of business, and description of clients.
4. Identify any parent corporation and/or subsidiaries, if applicable.
5. Identify any public information about mergers, acquisitions or other planned material changes in the company's corporate status that might affect this project.
6. List any industry awards/recognition that you have received, the awarding party, and the date received.
7. Provide a summary of your company's short-term and long-term goals and strategic vision.
8. Provide a list of three references similar in nature to this proposal which might allow NCCHCA to gain an independent reference on the products and services of your company.

SECTION IV – SYSTEM IMPLEMENTATION AND TECHNICAL SUPPORT

1. Describe and attach your proposed implementation plan.
2. What are the methods recommended for contacting technical support?
3. What are your hours of operation for technical support?
4. Describe ongoing system support provided by the vendor.
5. Are system upgrades provided as part of the support contract?
6. Describe your software upgrade process. When is your next release scheduled? Does the proposed project utilize the most recent version available?
7. How are customer requests for enhancements and customizations handled?
8. Describe the recent history of system enhancements.
9. Do you have a formal or informal users' group? (Please describe.)
10. Describe schedule of previous upgrades.

SECTION V – SYSTEM FUNCTIONALITY

1. Describe the functionality of your Online Membership and Event Management System. (Addressing NCCHCA needs, outlined in the Project Overview on pages 3 and 4.)
2. Describe how your system integrates with common website platforms, and provide examples of website platforms your system currently works with.
3. Describe the process of importing data to your Online Membership and Event Management System.

SECTION VI – PROJECT PROPOSAL

Provide a system proposal that includes:

1. Details of platform and functions, and how it is accessed by users: internal (NCCHCA) and external (our site users).
2. Cost of proposed system. Indicate whether charges are recurring or one time.
3. Description of training included, including location, method of delivery, length of time.
4. Description of ongoing technical support processes, and accessible time frames.
5. Total cost for length of contract. Specify duration.
6. Detailed timeline for the project.

SECTION VII – REQUEST FOR PROPOSAL REQUIREMENTS

1. NCCHCA will not enter into any contract or sign any document, the terms of which require NCCHCA to waive conditions or requirements negotiated via this solicitation process, provided for in this document, our purchase order, or by mutual consent.
2. Notwithstanding any other provision of this RFP, NCCHCA expressly reserves the right to waive any irregularities; to reject any or all proposals in whole or in part; to select the proposal that in the sole opinion of NCCHCA best meets the organization's interests; or reissue a request for proposals. NCCHCA also reserves the right to negotiate with potential bidders so that its best interests are served. Proposals will be evaluated on the assumption that the proposed costs are your most favorable.
3. Your response to this RFP constitutes an offer to do business with NCCHCA under the terms, conditions and pricing collectively gathered by this solicitation process. In the event a contract is awarded, NCCHCA, at its option, may incorporate all or parts of your response in

that contract. Any or all answers and information contained within your proposal shall become part of the final agreement between you and NCCHCA.

4. All proposals or offers must be signed by a duly appointed officer or agent of your company.
5. While NCCHCA will not share your proposal with other bidders, no part of your offer or proposal can be guaranteed proprietary or confidential due to auditing purposes.
6. Proposals responding to this Request shall not be tied to any potential or future arrangements
7. Subcontracting: Proposals must document any intent to use another vendor(s) or private individual(s) as a subcontractor(s) for any part or whole of the services they offer in response to this RFP. NCCHCA reserves the right to approve or reject any subcontracting agent or reject quotations based on the use of subcontracted work if not in the best interest of NCCHCA.
8. Conflicts of Interest: NCCHCA as a corporation is bound to avoid conflicts of interest in the procurement of services. By submitting your proposal, you guarantee that no attempt has been made or will be made by Contractor to include any other person, partnership or corporation to submit or not to submit a response for the purpose of restricting competition and no employee, agent or consultant of NCCHCA will receive any payment or any other form of compensation in connection with the contractor's proposal.
9. You will not be compensated for expenses incurred in your proposal preparation.
10. Those responding to this document should advise the below contact immediately of any ambiguity, inconsistency or error, which they may discover upon examination of this RFP.
11. Additionally, all questions regarding RFP solicitation or should be directed to the contact above.
12. Those vendors responding to this RFP should email the below contact with your intent to respond As Soon As Possible.
13. Vendor proposals should be organized in the same sequence as this RFP and should respond directly to each specification item, requirement, or questions at the level of detail at which is presented. In addition to point by point responses, you may include descriptive literature if you make reference to specific contents. In reviewing the proposals, NCCHCA employees will not search through general literature.
14. Where you are requested to supply information, include that information in the body of your response or note that it is comprised of an attachment to your response.

15. Failure to respond to all items in this RFP may result in the respondent's disqualification at the discretion of NCCHCA.
16. While responses should address all RFP items, it is important to note that we also encourage, solicit, and will consider any creative ideas for improvements or cost savings related to this transaction that may not be noted in this document. Any optional arrangements should be described and priced separately.
17. Your proposal will define in scope and out of scope activities. Your proposal will set the hourly rate for out of scope activities.
18. Your proposal will clearly identify any Not-For-Profit allowances or discounts.
19. The awarded vendor will provide a named "project manager" to oversee the procurement, implementation, and remediation phases of the project. This project manager will layout the project plan, tasks and due dates. Additionally, this project manager will coordinate the communication of NCCHCA employees with the vendors' various staff and departments (engineering, sales, management, support, etc).
20. Proposals should include pricing for service and support under a 5-year contract. Please include an option for a longer-term contract.