



## NOTICE TO PROPOSERS

FOR: ASSOCIATION MANAGEMENT SYSTEM

RFP#: 2020-AMS *Johnnie Terry*

OPEN: January 31, 2019

TIME: 3:00 P.M. Standard

Notice is hereby given that the Board of Directors of the California Association of Public Procurement Officials, Inc., (CAPPO), will receive up to and not later than **3:00 P.M. Standard, January 31, 2020** Request for Proposals (RFP's) for an **ASSOCIATION MANAGEMENT SYSTEM** and that such RFP's shall be emailed to Attn: Johnnie Terry, Secretary-Treasurer, at [cappo@admin.org](mailto:cappo@admin.org), on the above date at the stated time.

All inquiries regarding this RFP must be submitted in writing to [cappo@admin.org](mailto:cappo@admin.org) no later than **3:00 PM PST, January 17, 2019**.

### TABLE OF CONTENTS

1. RFP Overview	3
2. Documents to be Included in Proposal Package	4
3. Evaluation Criteria	5
4. Appendices: A – Signature Page B – Qualifications C – Project Approach D – References E - Requirements F – Price Schedule	
5. Exhibit 1 - Job Posting Screen Print	
6. Exhibit 2 - Member Data Fields	
7. Exhibit 3 - Member Payment Data Fields	

## **RFP OVERVIEW**

This solicitation is intended to provide a mechanism for the California Association of Public Procurement Officials, Inc., (CAPPO) to procure a cloud-based Association Management System (AMS) that enables the membership to collaboratively exchange ideas and resolve problems affecting California's public agencies by sharing information on technical advances, cost factors, new laws, and sources for products and services. CAPPO uses the following third party systems and will evaluate proposals that include or integrate with these systems.

- Yourmembership (YM) – Association Management System
- Survey Monkey – Online surveys
- BoardEffect – Board of Directors portal, file repository
- Dropbox – Share and transfer files for annual conference planning
- Cisco WebEx - Video conferencing, online meetings, screen share, and webinars

CAPPO requires that the membership database include functionality to create members into assigned groups. Each group shall be assigned a primary member. The proposed solution shall include a membership database that has the ability to automatically send membership renewals via email to the primary group member and not to all membership within a single group. In addition, the primary group member must be able to add or remove members of their assigned group, issue a single invoice (i.e., membership renewal fees) for multiple members within their group. For example, the County of Riverside group includes a single primary group member with 25 individual group members (See Exhibits C and D –Member Data and Payment Fields).

CAPPO invites responses that offer to provide an integrated cloud-based AMS solution as described herein.

### **1. BACKGROUND**

CAPPO, Inc. was formed in 1915 as a U.S. nonprofit corporation and is recognized by the U.S. Internal Revenue Service as a 501(c)(3) organization dedicated to maintaining the highest standards of professional behavior and ethical conduct in public procurement. As the oldest public procurement association in the United States, CAPPO members exchange ideas in an effort to resolve problems affecting California's public agencies by sharing information on technical advances, cost factors, new laws, industry trends, and resources. CAPPO is committed to providing members with knowledge and skills that promote best practices in public procurement. CAPPO is a resource for networking, education, and career advancement.

CAPPO's Board of Directors consists of nine (9) positions: President, Immediate Past President, First Vice President, Second Vice President, Secretary-Treasurer, and four (4) directors. Two (2) directors supporting Southern California and two (2) directors supporting Northern California. In addition, there are 15 local CAPPO chapters located throughout California that will need access to microsite pages. Click on the following <https://www.cappo.org/page/AboutCAPPO> and <https://www.cappo.org/page/BoardofDirectors> for more information.

### **2. AGREEMENT PERIOD**

Any agreement resulting from this RFP shall be for a one-year term commencing with execution of an agreement by the Contractor and the CAPPO Board of Directors. CAPPO reserves the right, upon mutual agreement, to extend any resulting agreement(s) for four (4) additional one-year terms at the same terms and conditions as the original agreement.

- This RFP is not an offer by CAPPO to enter into an agreement under these or any other terms. Acceptance of a proposal neither commits CAPPO to award an agreement to any Proposer, even if all requirements

stated in this RFP are satisfied; nor limits CAPPO the right to negotiate in its best interest. CAPPO reserves the right to reject all proposals and not make a decision, or to contract for only a portion of the proposed solution. All costs for proposal preparation are the responsibility of the Proposer.

### 3. RFP CONTACT

All inquiries regarding this RFP must be submitted in writing to Attn: Johnnie E. Terry Jr., CAPPO Secretary-Treasurer, at [cappo@admin.org](mailto:cappo@admin.org). Questions will be received no later than January 17, 2020. Any interpretations, changes, additions or deletions will be made only by addendum duly issued, and a copy of such addendum will be emailed to all prospective proposers.

### 4. RFP DELIVERY

A proposal shall be emailed Attn: Johnnie Terry, Secretary-Treasurer, at [cappo@admin.org](mailto:cappo@admin.org), on the date and stated time listed in the Schedule Dates of Importance. As an alternate, proposer may also include a link to a downloadable version. Any Proposal received after the scheduled closing date and time may be rejected. After the Proposals are opened at the designated time, no commitment will be made at that time until all Proposals are evaluated for pricing, specifications and other pertinent information. All Proposers submitting an RFP shall be responsible for familiarizing themselves with the conditions and requirements of the RFP prior to submitting their proposal.

### 5. DOCUMENTS TO BE INCLUDED IN PROPOSAL PACKAGE

Indicated a (√) next each item that the document has been included in your proposal.

DOCUMENT TITLE	(√)
Appendix A – Signature Page	
Appendix B - Qualifications	
Appendix C – Proposer Project Approach	
Appendix D – References	
Appendix E – System Requirements	
Appendix F – Proposer Price Schedule	
Addenda – Signed & Dated	

### 6. SCHEDULED DATES OF IMPORTANCE

DESCRIPTION	DATE
RFP Release Date	January 3, 2020
Last day to submit questions	January 17, 2020
RFP due date, no later than 3:00 PM PST/PDT	January 31, 2020
Tentative Board Approval	February 21, 2020
Tentative Agreement Start	March 2020
<b>Dates Subject to Change</b>	

## 7. EVALUATION CRITERIA

All proposals received by the specified deadline will be reviewed by the Evaluation Committee for content, proposed price and service cost, and capabilities of the Proposer. After initial screening, the Evaluation Committee may shortlist, for further evaluation, those Proposers deemed most qualified based on a review of the proposals. Interviews and demonstrations may be conducted with one or more Proposers as part of the final selection process. Proposers are advised that CAPPO, at its option, may award an agreement strictly on the basis of the initial proposals.

Award will be in accord with, but not limited to, the result of our evaluation of your submitted response relative to:

- a. Functionality - The degree to which the proposed software solutions satisfies CAPPO's requirements out of the box.
- b. Vendor Qualifications – Experience, infrastructure and resources of vendor.
- c. Vendor Reputation - The number of customers the vendor has provided hosted solutions similar to that proposed, and the customer support record of the potential vendor. Vendor has demonstrated ability to implement the project within the contracted time and cost.
- d. Understanding - The degree to which the vendor demonstrates an understanding of CAPPO's business needs.
- e. Flexibility/Scalability - The ability of the proposed solution to adapt to changing functional and business requirements.
- f. Usability - The ease of use of the web components for all categories of users including staff, members and nonmembers. The ease of operation of the proposed solution to ensure user acceptance and minimize training.
- g. Price - The solution is competitively priced with solutions using similar technology and cost-effectively meets all of CAPPO's needs. Total cost of ownership (up-front and over 5 years).
- h. Training and Support - The quality and depth of training provided, and support available after implementation.
- i. Product History - The number of versions of the software and the length of time it has been on the market.
- j. Presentation – If selected for the Demonstration Phase, the ability of the vendor to effectively demonstrate the proposed solution and how the proposed system will be used to satisfy the needs of CAPPO.
- k. Cyber and Data Security – The solution addresses industry standards on preventative methods used to protect information from being stolen, compromised or attached.

The top scoring provider responses may be invited to provide a demonstration and/or interview of their proposed solution. Demonstration/interview TBD.

A Notification of Intent to Award may be sent to any Proposer selected. Award is contingent upon the successful negotiation of final contract terms. Negotiations shall be confidential and not subject to disclosure to competing Proposers unless an agreement is reached. If contract negotiations cannot be concluded successfully, CAPPO may negotiate a contract with the next highest scoring Proposer or withdraw the RFP.

Agreement is contingent upon the CAPPO Board of Directors final approval.

## **8. BASIS OF AWARD**

The responsiveness, competency and responsibility of Proposer and of their proposed subcontractors will be considered in making the award of agreement. Any Proposer before being awarded an agreement may be required to furnish evidence satisfactory to CAPPO that Proposer and their proposed subcontractors have sufficient means and experience in the type of work called for to assure completion of the award agreement in a satisfactory manner. CAPPO reserves the right to reject the response of any Proposer as not responsible and not qualified to do the particular work under consideration who has previously failed to perform properly or to complete on time award agreements with associations of similar size to this project. Other factors that may be considered by CAPPO to determine a responsible proposal and the overall capability of the Proposer to satisfactorily complete the work under consideration may include, but are not limited to: insufficient experience, experience on other similar projects, experience doing the same type of work, length of tenure and capacity with bonding or insurance company, financial stability, and whether a Proposer has been terminated on other projects.

Proposals will be considered valid for a period of 180 calendar days after RFP closing date above.

## **9. RIGHTS TO SUBMITTED INFORMATION**

All RFPs become property of CAPPO. Proprietary material must be clearly marked as such. Pricing and service elements of the successful RFP are not considered proprietary information.

CAPPO will treat all information submitted in a proposal as available for public inspection once CAPPO has an award agreement finalized with the selected Proposer. If you believe that you have a legally justifiable basis for protecting the confidentiality of any information contained within your proposal, you must identify any such information, together with the legal basis of your claim in your RFP. The Proposer agrees to defend and indemnify CAPPO for any liability, costs, and expenses incurred in asserting such confidentiality as part of your RFP. The final determination as to whether CAPPO will assert your claim of confidentiality on your behalf shall be sole discretion of CAPPO.

## **10. ERRORS AND CORRECTIONS**

Proposers submitting an RFP are responsible for checking carefully all conditions and specifications. CAPPO will not be responsible for any error or omissions on the part of the Proposer submitting an RFP in making a RFP. No erasures are permitted. Mistakes may be crossed out and corrections made adjacent, and must be initialed in ink by person signing the RFP. Verify your RFP before submission as they cannot be withdrawn or corrected after being opened.

## **11. ADDENDUM**

Discrepancies in and omissions from the RFP documents or questions as to their meaning shall, at once, be brought to the attention of Johnnie E. Terry Jr., at [jeterjrr@gmail.com](mailto:jeterjrr@gmail.com). Any interpretations, changes, additions or deletions will be made only by addendum duly issued, and a copy of such addenda will be emailed to all known prospective proposers. CAPPO will not be responsible for any other interpretations or changes. Any addenda issued must be signed and returned with other RFP response documents at the time and date set for the RFP opening. It is the Proposer's responsibility to indicate acknowledgement, sign, and return addenda with their response.

## **12. INFORMATION AND PROPERTY OWNERSHIP**

All computer data, paper records, and supplies purchased by CAPPO are the property of CAPPO. CAPPO website content and domain name is owned by CAPPO.

## **13. PREVIOUS PERFORMANCE**

Proposers submitting an RFP are advised that the CAPPO reserves the right to reject a RFP from a Proposer submitting an RFP that cannot demonstrate the ability to provide the services required. Past service and delivery performance with a similar sized organization and scope of work is a factor in the determination of award against this RFP. Proposers submitting an RFP past performance practices and service to CAPPO will be examined. Proposers submitting an RFP who have demonstrated unsatisfactory performance will be subject to disqualification as a responsible Proposer submitting an RFP, thereby disqualifying the Proposer submitting an RFP from an awarded agreement.

## **14. COMPETENCY OF PROPOSERS SUBMITTING AN RFP**

No RFP will be accepted from or awarded agreement to a Proposer who is not licensed in accordance with the law, to whom a proposal form has not been issued by CAPPO and who has successfully performed on projects of similar character and scope to the proposed work. A representative of CAPPO, prior to an award agreement may examine the business premises of any Proposer submitting an RFP. Proposers submitting an RFP shall agree to fully comply with all City, State and Federal laws, regulations and ordinances governing performance of the awarded agreement. It will be the responsibility of the Proposer to obtain any clearances necessary for completion of the award agreement.

## **15. RIGHT TO REJECT PROPOSALS**

CAPPO reserves the right to reject any and all proposals, or any part of a proposal; to waive minor defects or technicalities; or to solicit new proposals on the same project or modified project, which may include portions of the original RFP document, as CAPPO may deem necessary and in its best interest. False, incomplete or unresponsive statements in connection with a submitted proposal may be sufficient cause for rejection. CAPPO will be the sole judge in making such determinations.

## **16. INSURANCE**

Limited Indemnification and Hold Harmless: Proposer and its agents, officers and employees shall defend, indemnify, and hold harmless CAPPO, its elected and appointed officers, agents, employees, volunteers, Proposers and representatives from and against any and all claims, demands, losses, defense costs, expenses, attorney fees, litigation expenses, or liability which CAPPO, its elected and appointed officers, agents, employees, volunteers, Proposers and representatives may sustain or incur, or which may be imposed upon them by law for damages due to personal and bodily injury or death of persons, or damage to property, to the extent caused as a result of or arising out of the operations, negligent acts, errors or omissions, caused in whole or in part by the agents, officers and employees of Proposer in the performance of and in accordance with the terms of the Agreement entered into between Proposer and CAPPO. The indemnification provisions contained in this Agreement include but are not limited to any violation of applicable law, ordinance, regulation or rule, including where the claim, loss, damage, charge or expense was caused by deliberate, willful, or criminal acts of either party to this Agreement, or any of their agents, officers or employees or their performance under the terms of this Agreement. The indemnity provisions of this Agreement shall survive the expiration or earlier termination of this Agreement.

**Additional Insured Endorsement:** CAPPO, its elected and appointed officers, agents, employees, volunteers, providers and representatives shall be listed as Additional Insured as respects the operations of the named insured. Coverage shall not be limited to the vicarious liability or supervisory role of any additional insured. Said insurance policy shall be endorsed (copy of Endorsement attached to Certificate of Insurance) to include the following language, "CAPPO, its elected and appointed officers, agents, employees, volunteers, Proposers and representatives shall be listed as Additional Insured as respects the operations of the named insured performed under the terms of this Agreement."

**Primary Insurance Endorsement:** In addition to the "Additional Insured" as stated above, said insurance policy shall be endorsed (copy of Endorsement attached to Certificate of Insurance) to include the following language, "Such insurance as is afforded by the Endorsement for the Additional Insured's shall apply as primary insurance. Any other insurance maintained by CAPPO, its elected and appointed officers, agents, employees, Proposers and representatives shall be excess only and not contributing with the insurance afforded by this Endorsement."

**Certificate of Insurance:** Prior to commencing services pursuant to this Agreement, Proposer shall provide certificates as evidence of the existence of the insurance required by this Agreement, on insurance certificates executed by a duly authorized agent of Proposer's insurance provider. Such certificate shall include the Endorsements described in this Agreement as attachments.

#### **17. HOLD HARMLESS STIPULATION**

The RFP shall indemnify and hold t CAPPO, its officers, agents, and employees, harmless from and against any and all loss, liability and expense (including attorney's fees) of any nature of kind whatsoever, on account of use by the publisher or author, manufacturer of agent of any copyrighted or un-copyrighted composition, secret process, trademark, patented or un-patented, article or appliance furnished or used under this RFP.

#### **18. ASSIGNMENT AND SUBCONTRACTING**

The contractor shall not assign or subcontract the work or any part thereof, without the previous written consent of t CAPPO, nor shall he assign, by power of attorney or otherwise, any of the money payable under this award agreement unless written consent of CAPPO has been obtained. No right under this award agreement , or claim for any money due or to become due hereunder shall be assessed against CAPPO or persons acting for CAPPO, by reason of any so-called assignment of this award agreement or any part thereof, unless such assignment has been authorized by the written consent of CAPPO. In case the contractor is permitted to assign monies due or to become due under this award agreement, the instrument of assignment shall contain a clause subordinating the claim of materials supplied for the performance of the work.

#### **19. TERMINATION FOR BREACH**

- a. CAPPO may unilaterally terminate an awarded agreement for any reason, in its absolute discretion, by giving Contractor 30 day's written notice of termination.
- b. An awarded agreement may also be terminated by either party upon 30 days written notice should the other party fail substantially to perform its duties or for any material breach under this agreement.
- c. In the event of early termination, Contractor shall be paid for satisfactory services performed to the date of termination. Upon payment by CAPPO, CAPPO shall be under no further obligation to Contractor, monetarily or otherwise, and CAPPO may proceed with the work in any manner CAPPO deems proper.



## **20. FORCE MAJEURE**

The parties to this agreement shall be excused from performance during the time and to the extent that they are prevented from obtaining, delivering or performing by Act of God, fire, strike, walk-out or commandeering of materials, products, plants, or facilities by the government, provided that the non-performance is not due to the fault or neglect of the supplier. In such cases, however, satisfactory evidence thereof must be presented, in written form.

## **21. INVOICING**

The Contractor shall submit invoices to CAPPO Office. All invoices must reference this RFP # and the service performed. Payments shall be made within thirty (30) days of receipt of invoice from the Contractor.

## **22. NON-DISCRIMINATION**

No Proposer will be discriminated against on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability in any consideration leading to the award of agreement. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award of agreement.

## **23. MODIFICATIONS**

Changes in or additions to the proposal, as well as any attachments, amendments or other official correspondence related to this document may not be manually, electronically or otherwise altered by Proposer or Proposer's agent(s). Recapitulations of the work proposed upon, alternative proposals, or any other modification of the proposal, which is not specifically called for in the award agreement documents, may result in CAPPO's rejection of the proposal as not being responsive to the invitation to propose. No oral or telephonic modification of any proposal submitted will be considered and mailed modification may be considered only if the postmark evidences that a confirmation of the mailed document duly signed by the Proposer was placed in the mail prior to the opening of proposals.

## **24. INDEPENDENT CONTRACTOR**

At all times during the term of the Agreement, Contractor shall be an independent contractor. CAPPO shall have the right to control Contractor only as far as the results of Contractor's services rendered pursuant to this Agreement.

## **25. COLLUSION**

Contractor shall not conspire, attempt to conspire, or commit any other act of collusion with any other interested party for secretly, or otherwise, establishing an understanding regarding rates or conditions to the solicitation that would bring about any unfair conditions.

**APPENDIX A  
ASSOCIATION MANAGEMENT SYSTEM  
SIGNATURE PAGE**

The undersigned, having carefully read and examined this RFP, and being familiar with all of the conditions applicable to the work for which this proposal is submitted hereby agrees to provide everything necessary to complete the work for which this proposal is submitted in accordance with the proposal documents herein. CONTRACTOR MUST COMPLETE THE FOLLOWING TO VALIDATE PROPOSAL

I hereby agree to furnish the articles and/or services stipulated in my proposal at the price quoted, subject to the instructions and conditions in the Request for Proposal package. I further attest that I am an official officer representing my firm and authorized with signatory authority to present this proposal package.

**COMPANY NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**PRINT NAME:** \_\_\_\_\_ **TITLE:** \_\_\_\_\_

**TELEPHONE #:** \_\_\_\_\_ **E-MAIL:** \_\_\_\_\_

**SIGNATURE OF AUTHORIZED AGENT:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**ALL UNSIGNED PROPOSALS MAY BE REJECTED**

**APPENDIX B**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROPOSER QUALIFICATIONS**

- 1. Company Profile:** Provide a complete description of your company. Include the following information in your profile:
  - a. Chronology of the company's growth, staff size, and ownership structure.
  - b. Indicate whether the business is a parent or subsidiary in a group of companies.
  - c. Provide the location of the office from which the applications and services are to be delivered and supported and a brief narration of the number of professional staff (i.e., analysts, programmers, support desk, etc.) employed at the office. In addition, indicate whether your firm is local, regional, national, or international.
  
- 2. Project Experience:**
  - a. Describe your firm's experience and qualifications implementing and maintaining similar AMS projects. In addition, address the number of installed sites and largest and smallest customer based on membership size or users. Response should reference at least two (2) of the three (3) associations, non-profits, or standards organizations included in Appendix F - References
  
- 3. Key Staff Persons:** Proposer shall provide a list of key staff and their qualifications and experience that will be assigned to implement your proposed solution as a result of this RFP.

**APPENDIX C**  
**REQUEST FOR PROPOSAL**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROJECT APPROACH & SYSTEM SECURITY**

1. **Project Approach:** Please provide a project implementation plan that demonstrates a clear understanding of the project goals, assumptions, objectives, and provide for the allowance of continued use of your proposed solution in the event that either the Board of Directors or the contractor chooses not to extend the agreement.
  - a. Provide a clear description of the approach, methodology and high-level tasks to be used to accomplish the work to meet the requirements of this RFP. Response should address implementation, cyber security, data migration, initial training and support.
  - b. Describe any assumptions that may affect the project and any limitations (e.g., professional service hours, third party functionality, etc.).
  - c. Describe how your team's project management shall ensure that the work is performed effectively, efficiently on budget and on time.
  - d. Identify any third party (i.e., vendors) functionality that the contractor does not currently provide.
  - e. Describe your customer support program; include average response time and methods of communication.
2. **System Performance and Security:**
  - a. Proposed system shall effectively secure and protect client information. Please state your cyber and physical security measures. Response must address security policies, restricting internet access and internal or third-party security audits.
  - b. Proposed system must be available 24/7, 365 days per year. Please describe in detail how this requirement will be met. Response must address database backup, system recovery and failover capabilities.
  - c. Please describe in detail your process for scheduled, unscheduled maintenance and unplanned outages. Response must address customer communication and notification process.
  - d. Describe your internal controls and protocols for handling client data.
  - e. Please describe your storage retention policy. Response must address your data non-release policy.

**APPENDIX C**  
**REQUEST FOR PROPOSAL**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROJECT APPROACH & SYSTEM SECURITY**

**3. System Updates:**

- Describe the process and timing for updates; can updates be limited to specific hours and days of the week? Response must address an update/upgrade testing process, rollout plan and communication process.

**APPENDIX D**  
**REQUEST FOR PROPOSAL**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROPOSER REFERENCES**

Submittal of a reference authorizes CAPPO to investigate without limitation the background and current performance of your company. We will use the input of customer references regarding your capacity to perform in relation to all aspects of this RFP. References demonstrate Proposers' proven record of providing services

Each Proposer must have demonstrated experience delivering similar AMS solutions as outlined in this RFP for other similar sized associations, non-profits, or standards organizations. Using the table below, please list three (3) references for which you have implemented a solution relevant to what is detailed in this RFP.

For each reference, include the following information:

- a. Customer, client name,
- b. Associations, non-profits, or standards organizations member size,
- c. Project manager name, project manager's telephone number and email,
- d. AMS description to include products and services, and
- e. Customer Website

Customer Reference 1 of 3	
Proposer Name:	
Customer Name	
Membership Size	
Customer Website	
Project Manager Name	
Phone Number	
Email	
Description of Association Management System:	

**APPENDIX D**  
**REQUEST FOR PROPOSAL**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROPOSER REFERENCES**

<b>Customer Reference 2 of 3</b>		<b>Proposer Name:</b>	
<b>Customer Name</b>	<hr/>		
<b>Membership Size</b>	<hr/>		
<b>Customer Website</b>			
<b>Project Manager Name</b>	<hr/>		
<b>Phone Number</b>	<hr/>		
<b>Email</b>	<hr/>		
<b>Description of Association Management System:</b>			

**APPENDIX D**  
**REQUEST FOR PROPOSAL**  
**ASSOCIATION MANAGEMENT SYSTEM**  
**PROPOSER REFERENCES**

<b>Customer Reference 3 of 3</b>		<b>Proposer Name:</b>	
<b>Customer Name</b>			
<b>Membership Size</b>			
<b>Customer Website</b>			
<b>Project Manager Name</b>			
<b>Phone Number</b>			
<b>Email</b>			
<b>Description of Association Management System:</b>			



**APPENDIX E**  
**RFP ASSOCIATION MANAGEMENT SYSTEM**  
**REQUIREMENTS**

The EXAMPLE ID No. EX1 below represents a response that includes a Response for "Y1" where the proposed solution meets the requirement "out of the box". Responses are required for how your proposed solution meets the "Requirement". Response to each requirement number must have a sufficient level of detail to explain or illustrate how your solution satisfies the requirement. Your response shall reference any cost considerations in Appendix G - Pricing Schedule.

<b>Ability</b>	<b>System Functionality Ability Description</b>
Y1	Meets, Out of Box. The requirement is automatically met by the standard "out of box" functionality of the solution, without the need for any configuration or customization during the implementation.
Y2	Met via Upcoming Release in < 1 year. The requirement will be met via functionality that will form part of a formal release within one year of the proposal due date. An upgrade, requiring no customization, will deliver the functionality as described in the requirement.
Y3	Can Not Be Met in < 1 year. The requirement cannot or will not be met as stated, whether via an upcoming release within 1 year of the proposal's due date or via customization.
Y4	Can Not Be Met

<b>ID No.</b>	<b>Technology: Security Requirements</b>	<b>Ability</b>
1	Hosted: Proposed system must be a cloud-based solution. Please describe in detail how this requirement will be met. Response must address cyber, data (i.e., PCI) and system security strategy.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
2	<p>Membership Database – Database shall include functionality to add members into groups based on their agency type (i.e., county, city, school district, etc.) and maintain a full contact database that is can searched using different criteria.</p> <ul style="list-style-type: none"> <li>• Customized membership levels (i.e., committees, individual, organization, supplier, partner, etc.)</li> <li>• Member self-service profile update (i.e., title, phone number, etc.).</li> <li>• Automatic Invoicing (e.g., four notices – 60, 30, due, past due, etc.)</li> <li>• Member search (i.e., name, organization, title, chapter, etc.)</li> <li>• Export data (i.e., fees, etc.) to Quick Books software</li> </ul> <p>Please describe in detail how this requirement will be met. Response must include a diagram on the relationship between data fields and address field permissions.</p>	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
3	Currently, members are able to register online for training (i.e., conferences, webinars, seminars, etc.). Please describe in detail how your proposed solution meets this requirement. Response must address how online fees, payments and how attendee education and training credits are recorded. In addition, include a diagram that describes the process flow from online registration to training completion confirmation.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
4	Ad-hoc and Canned Reports (i.e., member analytics, invoices and summaries. Please describe in detail how this requirement will be met. In addition, include sample reports that demonstrates proposed system reporting capabilities.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
5	News – Ability to create online flyers, newsletters and announcements. Please describe in detail how this requirement will be met. Please include a sample flow chart that displays how to create and distribute an online newsletter to the membership.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
6	Website <ul style="list-style-type: none"> <li>• Web browsers (i.e., IE, Safari, Chrome, etc.)</li> <li>• Mobile (IOs, Android, etc.)</li> <li>• Compatibility (i.e., Chrome, IE, Firefox, etc.)</li> <li>• Store and Ecommerce</li> <li>• Builder (i.e., drag and drop)</li> <li>• Subpages</li> <li>• Access controls (i.e., admin, user, committee, board, etc.)</li> <li>• Job board (i.e., subscribe, post, etc.) – See Exhibit A.</li> <li>• Online fees and payments (i.e., membership, events, store, etc.)</li> <li>• Accessibility standards</li> </ul> Please describe in detail how this requirement will be met.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
7	Listserv – Functionality where members can subscribe and unsubscribe by sending an email to an email address with the proposed system. Please describe in detail how this requirement will be met. Response must address refresh frequency, sub-lists, attachments, moderator, mailing list, and archive and retrieval process and include examples of screen shots.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
8	Data Conversion - The vendor is responsible for the conversion of CAPPO's current membership data into the new AMS. It is acceptable for a vendor to provide a data template in order for CAPPO to "prepare" their own data for transfer. Please describe in detail how this requirement will be met.	
Explanation:		

ID No.	Technology: Functional Requirements	Ability
9	AMS Admin Training shall include online training for 5-6 individuals (i.e., train the trainer). Please describe in detail how this requirement will be met. Response must address access to any online resources (i.e., LMS, etc.).	
Explanation:		

ID No.	Technology: Version Management, Data Backup and Retrieval	Ability
10	Please describe in detail the following: <ul style="list-style-type: none"> <li>Version management – What is the update process? Are clients required to upgrade?</li> <li>Data backup – What is the update process? Frequency and location? Ownership?</li> </ul>	
Explanation:		

Although ID No. 11 is not a required functionality, responses provided shall be evaluated.

ID No.	Technology: Functional (Desirables)	Ability
11	Third Party Functionality: Please describe whether your proposed solution includes the following components or functionality: Yourmembership (YM), Survey Monkey, BoardEffect, Dropbox or cloud-based storage, Learning Management System or Cisco Webex. Response must address integration with any other proposed 3 <sup>rd</sup> party systems.	
Explanation:		

EXHIBIT 1  
JOB POSTING





<https://www.cappo.org/>

Screen Print 1: Job Posting (Access restricted to current members)

[About CAPPO](#) [Community](#) [Chapters](#) [Membership](#) [CAPPO Conference](#)

## Career Center

Community » Career Center

 [Search Openings](#)  [Resumé/CV Search](#)  [Submit an Opening](#)  [Subscribe](#)

Post job openings, find potential candidates, search openings and subscribe to new posting notifications.  
**Job postings are validated and available on the website within 32 - 48 hours.**

### CAPPO Current Job Postings

Buyer II  
County of Santa Clara San Jose, California  
November 1, 2019

---

Director of Purchasing and Support Services  
San Joaquin County, CA Stockton, California  
October 28, 2019

---

Director of Procurement  
County of Santa Clara San Jose, CA, California  
6 days ago

---

Buyer  
Chabot-Las Positas Community College  
District Dublin, California  
6 days ago

---

Contract Monitor  
Purchasing and Warehouse Los Angeles,  
California  
6 days ago