Request For Proposals (RFP)

ASSOCIATION MANAGEMENT SYSTEM

Submittal Deadline: January 10, 2020
Contract Award Date: March 31, 2020
New AMS Go Live: No later than July 1, 2021

INTRODUCTION
The New England Water Works Association (NEWWA) is a membership organization for those working or interested in the drinking water profession. Headquartered in Holliston, Mass., it brings together water utilities, consultants, manufacturers, vendors, regulators, academia, students, and other interested parties to network, educate, and advocate.

Established in 1882, NEWWA is a not-for-profit (501c3) member organization incorporated in the commonwealth of Massachusetts. The association is accredited by the International Association for Continuing Education and Training and holds hundreds of courses each year for those working in the water works profession. In addition, the association holds two major conferences and several specialty symposia each year. Built around networking, NEWWA’s strength is its membership, who volunteers on its vast number of committees to produce products, information, and courses.

Since 1882 NEWWA, Inc. has served drinking water professionals from across New England. In 1987, NEWWA Inc. affiliated itself with the American Water Works Association (AWWA) as a section to provide the opportunity for members to join and receive benefits of both associations at a reduced rate. To this day, members still have the option of joining NEWWA, Inc., or AWWA with NEWWA as the designated section. Currently, there are approximately 500 NEWWA, Inc. members and 2,500 NEWWA, A Section of AWWA, members. In addition, NEWWA has approximately 3,000 certified professionals under its cross connection control and backflow prevention programs and serves approximately 5,000 students each year (some are members, others nonmembers). NEWWA’s current database consists of approximately 57,000 records.

NEWWA’s Vision
Our vision is to inspire excellence in the drinking water profession, public confidence in tap water, and water resource stewardship.
**NEWWA's Mission**
Our mission is to promote public health, safety, quality of life, and environmental stewardship through education/training, advocacy, and outreach relating to safe drinking water and to advance the membership as noted in the AWWA Articles of Incorporation.

**Strategic Plans**
The NEWWA Strategic Plan refines and builds on the goals from previous plans and is a basis for plans to be established by the NEWWA Board of Directors as it guides our many volunteers and staff. The update of the Long-Range Strategic Plan, last done for 2018-2023, was developed with consideration to previous plans. An effort was also made to sustain the ongoing initiatives from prior plans to keep momentum moving forward, creating the **NEWWA 10-year vision of 2015-2024**.

The long-range Strategic Plan and 10-year vision reflect the work done by the Planning Committee, which provides direction for the Spring and Fall Council Meetings as well as Summer Planning Session. Discussions and recommendations from previous planning efforts are evident throughout the plan and vision.

In addition, each year the association president develops a set of goals for his/her tenure. For 2019-2020, President Barbara Cook's goals are:

- Work with NEWWA staff, committees, and volunteers to produce at least three YouTube outreach videos.
- Enable better electronic committee communication to promote greater volunteer involvement.
- Continue to provide education and training and collaborate with state associations throughout New England.
- Enable better inclusion

**Staff**
NEWWA employs **12 full- and part-time staff**, comprised of an executive director, deputy executive director (who also acts as the director of education and training), accounting manager, backflow prevention & cross connection control coordinator, events & marketing specialist, publications coordinator, materials preparation assistant, registrar, accounting clerk, membership & volunteer coordinator, instructor, and facility & office manager.

**Governance Structure**
NEWWA is a member-run organization, with the executive director reporting to the board of directors. There are 17 members on the board, holding the position of president, president-elect, vice president, treasurer, assistant treasurer, immediate past president, AWWA
director, three directors-at-large, and state directors for each New England state (two for Massachusetts).

There are **10 councils, 55 working committees, and 39 standards committees**.

**Sources of Revenue and Financials**
NEWWA gains revenue from training programs, conferences, events, membership dues, sponsorship, contracts, certifications, and grants. The accounting software currently in use is Microsoft Dynamics GP (i.e., Great Plains, Version 2013).

Funds are mainly received through on-line credit card payments (utilizing third-party processing system – PayPal), check, money order, wire transfers, and via purchase orders.

**RFP Purpose**
The purpose of this RFP is to solicit proposals from interested parties to provide an Association Management System, which assists in automating the day-to-day operations of NEWWA.

The high-level goal of the resulting contract will be to assist NEWWA in improving the management of its member relationships, and automate existing processes related to membership and committee management; awards & scholarship management; conference and event management; training and event registrations; certification tracking, management, and fulfillment; as well as integrating with current financial and bookkeeping processes (Great Plains software), and possibly also including a learning management system as well as web site upgrading, integration, and content management.

**Existing Systems**
NEWWA currently maintains a number of systems as part of day-to-day association management:

- Its current AMS, which utilizes GoMembers software through Avolin (data will need to be transferred from this system).
- ExpoCAD, which manages the trade floor for NEWWA's Spring Conference each April in Worcester, Mass (approximately 200 booths).
- A website, newwa.org, which utilizes the Dot Net Nuke platform and content management system, which has been integrated with our AMS (via an iframe) to allow for a single sign on for users. Members can currently register and pay for courses and events online.
- CodeReadR software, which allows for scanning of badges for credit hours. All scans are uploaded to NEWWA's AMS for processing post-event.
- Great Plains accounting software (Version 2013), from which current processes including accounts payable, financial reporting, and bank transactions are managed. Invoicing and accounts receivable are currently processed through the existing AMS.
- Constant Contact, for email marketing.
- Your Membership, by Community Brands, for online career center.
Naylor Association Solutions for website advertising.

For the above systems, please specify whether or not you currently have an integration system in place with these companies. If you do not, what would your integration solution be or do you offer something that can replace them?

As part of this project, NEWWA aims to manage as many of the below high-level functions using the AMS as possible. However, we realize not all features will be available in an integrated AMS, and below is a more detailed breakdown of features expected upon initial deployment.

**Vendor's Responsibilities and Requirements**

The vendor's responsibilities in performance of this contract include:

- Provide an Association Management System which allows NEWWA to automate existing business processes (or make them more efficient), to reduce the workload associated with their operation.
- Provide consulting on the implementation and integration of the Association Management System.
- Transfer all data from NEWWA's current AMS into the new software platform and create customizable data storage for extensive member and organization data.
- Provide solution to transferring website login credentials from old system to new AMS.
- The vendor is expected to propose and provide consulting services to support integration and conversion of existing data from NEWWA's existing business applications.
- Provide at least one full-day session of on-site training to NEWWA staff on the new system.
- Provide additional online training, as well as support, report development, and helpdesk services to users of the Association Management System.

**Major System Requirements**

- System MUST be able to download American Water Works Association (AWWA) membership data (currently arrives as a .csv file, and AWWA utilizes Personify), which then allows NEWWA to import the data into its own AMS (for NEWWA, a section of AWWA members). Staff must be able to conduct a download of member data at their discretion, and on their own schedules. **This feature is a non-negotiable requirement for the new AMS.**
- Relational database software flexible enough to handle all association management functions. It should enable NEWWA to maintain all relevant information related to members, nonmembers, prospective members, students, certified individuals, advertisers, exhibitors, and sponsors in a single master database, and allow ease of extraction by both technical and non-technical administrative personnel.
- Vendor must have the ability to transfer data from previous AMS and create customizable data storage for extensive member and organization data.
- Users can have access to dashboard capability with graphs and charts.
- Ability to set user permissions for in-house staff for specific modules.
Constituent Management

- Staff has the ability to check for duplicate “master” records at data entry. Also allow for an automated and/or approval process to eliminate the creation of or overlap of duplicate records as a result of online registrations by users. In addition, allow for merging of duplicate records into one record.
- Ability to create category codes to track information within constituent records (e.g., “do not mail,” “retired,” “no fax,” “no email,” etc.).
- System should be able to track changes for each constituent across all modules and show a record log for all changes made to a specific record.
- Staff has access to a report function for membership demographics, behavior, and participation.
- Automation of dues management: manage the issuing of invoices, matching those against inbound payments to ensure membership is up-to-date.
- Manage individual membership data and organizational membership data and payments.
- Users automatically receive receipts for any payments made.
- Users can automatically click a link or button if they have forgotten their password and it will send them their login credentials.
- Members can update their personal profile using text box answer fields. NEWWA should be able to control which fields members have access to manipulate.
- Staff has the ability to track and report on certain key data points, and develop and run queries for specific job functions.
- Staff has the ability to allow one person from a company membership to have access to the company profile information, and that contact is able to pay dues or training fees for the entire group that will reflect in each individual member's profile (parent/child relationships).
- Staff has the ability to easily run reports on how many members are part of an organization membership and the number of members each organization has.
- Staff has the ability to run reports of dropped and lapsed members and are able to convert to an excel spreadsheet.
- Staff can easily run renewal reports.
- The system can automatically remind members when they log in to their profile of when their membership is going to expire – automatically at 60 days, 30 days, etc.
- Staff has the ability to generate past-due notices and keep a history of when they are sent.
- Staff has the ability to update records of all individuals who are part of an organization profile by updating the group profile.
- Staff has the capability of tracking member status of new, renewed, lapsed, or rejoined.
- Staff has the ability to differentiate between “billing” and “mailing” addresses (and all address types, e.g., home, business, billing, satellite addresses for vendors, etc.).
- Integration with accounting software or built-in accounting functionality: ease of pulling financial information related to dues into associated systems, such as accounting software (Great Plains). Ability to auto generate invoices for membership dues.
- Record retention – be able to set parameters to automatically delete a profile that has
either been dormant for a predetermined amount of time or for any other criteria set by staff.

Registration Management for Training & Events

- Ensure members and non-members can register for training and events organized by NEWWA via a single sign in on the website.
- Records management by event attendee, organization, and individual independently: Maintain and track history of individual organization member participation across events, even when a member changes organization.
- Conference, training, monthly meeting, symposia, and social event registration and payment handling:
  - The AMS must support “wait listing” when an event is fully registered, but slots may be opened at a later stage.
  - Conference fees vary based on membership level, activity level in the conference (for instance, speakers register at a reduced rate).
  - The AMS must allow generation and application of event discount codes.
  - Ability for user to view both member and nonmember rates when registering for an event online, even after being logged in as one or the other.
- Ability to customize specific registration features for an event (e.g., add a guest, choose a meal type, etc.).
- Detailed reporting features, including dashboarding for event registrations, attendance, etc.
- Ability for registrant to indicate any special needs requirements within their record (i.e., dietary restrictions, handicap access, special accommodations, etc.).

Event Management

- Ability to print bar codes/QR codes on badges for scanning at events (either from within the system or via synching with a third-party software).
- Administrators have the ability to track annual conference booths (either via integration with ExpoCAD or via new system already within the AMS), floor plans, etc.
- Ability to assess different rates (corner booth charge, sponsor discount, multi-booth discount, etc.).
- Ability to have a check in the system to prevent the same booth from being sold twice for a single event.
- Detailed reporting features, including contact information (primary and secondary contacts,) booth number, first time exhibitor, etc.
- Ability to copy exhibit set-up for following year.
- Ability to track vendor communication, outreach attempts, etc.
- Ability to add categories to vendor records, such as tanks, meters, engineering firm, etc.

Certification Modules

- During certification module initial setup, allow staff to indicate requirements for each certification type so that upon course completion, the system will recognize if a student has completed all requirements necessary to be granted certification.
- Staff must have the ability to run reports and view data at their discretion.
- When exam grades are entered in – the expiration date for new certified
testers/surveyors should automatically advance to the new expiration date, which would be the last day of the following month.

- For first-time backflow certifications, once a student has qualified to become certified, and after grades are entered into the system, a new tester/surveyor number needs to be created (following in sequential order from last tester/surveyor).
- Existing certification numbers must be retained with the individual (i.e., it does not get overwritten or transferred to a new individual).
- Staff has the ability to change any information within a tester/surveyor record regarding email address, address, phones, title, company etc.
- Staff has the ability to change which address will be used for mailing packets – home, business, etc.
- When entering exam information – the system should allow a record to be flagged with “passed,” “failed,” “no show,” or “withdrew.”
- Staff has the ability to run a report using the course code to save to Excel for merging with letters, CEUs, and certifications OR the ability to import student data based on a course code to automatically generate letters, CEU certificates, certifications, etc., and save to student profile.
- Staff has the capability to add PDF files to each individual’s record for future viewing AND printing OR the system allows for automated generation and saving of files as stated in previous bullet.
- The system must have enough capacity to retain 7 years worth of records for all certified individuals.
- Staff has the capability to select certified individual’s records by expiration dates for downloading into a .pdf document and posting on the website.
- System should allow for specific requirements to be attached to certain courses during course setup within the system in order for a student to be granted a certification once he/she completes the requirements. This should also be allowed for multiple certifications (e.g., across different states).

Credit Hour Tracking

- Either integrate with CodeReadR (or other code reading software suggested by vendor) or utilize module within AMS to upload scans directly into an attendee’s record to mark attendance for credit hour tracking.
- System must allow for “in” and “out” scans for an individual to verify he/she has attended a full technical session.
- For standard training events that don't require badge scans, when attendance is finalized, the system must be able to indicate a student has completed the course, and CEUs/TCHs reflected in their account (system should be able to differentiate between a CEU and TCH).
- Ability to generate student transcripts of past courses/events attended over a user-defined period of time.

Committee Management

- NEWWA members regularly convene in committees. Members should be able to apply for participation in committees through the AMS. If the tool enables centralized management of e-mail lists, document storage, and a Content Management Service, the AMS should permit individual groups to be created and offered core pieces of
functionality such as contact information, document sharing, and individual committee websites, which can be configured by a single or multiple committee members.

- System should have clear previous involvement records for committee members (past membership, chair, awards, etc.) within a member record (e.g., all information in one location rather than in multiple spots within a member record).

**Advertising**
- Ability to generate advertising invoices, with rates based on company/organizational membership.
- Detailed reporting features, including contact information (organization and point of contact,) etc.
- Ability to view past advertising history of companies.

**Sponsorships**
- Ability to register, track, and invoice sponsorships (annual and event specific).
- Need to be able to split revenue between multiple accounts (e.g., $500 to sponsor services acct., $175 to general fundraising).

**Publications**
- Allow subscribers to access *Journal* online like members can (e.g., set up “contact” for a subscription to provide online access to).
- An agency, on behalf of a subscriber, needs to be able to be billed for a subscription.

**Online Store**
- Ability for users to purchase books, gear, and other items via an online store.

**Web site**
- Ability for system to integrate with current website, allowing for a single sign on to view member-only content as well as registration and payment capabilities for training and events.
- Ability for committee chairs to access their committee rosters and be able to make changes to roster names via the website.
- *NOT REQUIRED FEATURE BUT WILL ENTERTAIN PROPOSALS:*
  - If the AMS includes a website feature, NEWWA will entertain converting its current website into a new platform.
  - Vendor will be required to transfer all pages/data from current website into the new platform.
  - Vendor agrees to work closely with NEWWA on new website design, conversion, and go live, including website hosting and SSL certificates.
  - Staff must be able to manage website from in-house (i.e., manipulate pages, add pages, delete pages, content management, etc.).
  - Vendor would be expected to provide technical support for website on an as-needed basis.

**Reporting Features**
- Ability to custom create system queries for specialized needs, or show system has queries already in place (e.g., mailing lists for specific publications).
Financial/Great Plains Integration
The following financial requirements must be supported (integration with Great Plains):

- Ability to accept multiple payment types for all types of receivables (cash, check/money order, credit card, PayPal/third-party payment platform, electronic funds transfer).
- Must be able to input purchase orders to specific transactions.
- Ability to enter invoices with full, partial or no payment, and the ability to cancel those invoices where required.
- Ability to track payment on an individual member, nonmember, company, advertiser, or sponsor basis.
- Ability to produce customized invoice statements.
- Payment of dues, generating delinquent dues reports and automatically remind members who did not yet pay dues. The AMS should allow for incremental late fees to be added to late invoices.
- Refunds of membership dues, sponsorship payments, and registration payments.
- Reminders of outstanding payments to companies and members.
- Ability to monitor/prevent online registrations for people with delinquent payments (bad debt field).
- Ability to reverse payment within a record due to insufficient funds (bounced checks).
- Ability for system to run a full batch of invoices for all delinquent accounts within a specified timeframe.
- Ability to accrue and defer income for any event within the AMS so it is reflected properly in Great Plains.
- Ability to split revenue between multiple accounts (e.g., membership dues, sponsorships).
- Ability to create miscellaneous invoices.

Data Security
Security and data privacy is a prime concern to NEWWA. We expect the contractor to include information on the security testing performed on their solution, and indicate the presence of a secure development lifecycle process. In addition, we expect each vendor to inform NEWWA of any critical security vulnerability addressed, and to provide a security update within a reasonable timeframe.

Proposal Preparation and Submission
- The response must include costs to provide all services outlined in this RFP.
- Describe how your proposal meets each requirement of this RFP.
- Identify the individuals who would contribute to the project. Describe the qualifications of each individual.
- Provide references from jobs of similar size and scope with the proposal submittal.
- Provide examples of work from jobs of similar size and scope with proposal submittal.
- Any agreements (e.g. licenses, etc.) that vendor or any third party proposes to be entered into as part of a contract resulting from this RFP must be included with the proposal response.
- List all features that are included by default, and those which can be purchased as a component add-on or additional (modification) feature.
- A representative authorized to bind the company must sign the proposal.
• The proposal must be submitted in PDF form via email to kking@newwa.org.

Proposal Receipt Deadline - 5:00p.m., EST, January 10, 2020.
Questions to Vendors/Requests for Demos – January & February 2020
Board Discussion/Vote - Contract Awarded – March 31, 2020
Project Completion/Go Live Deadline - No later than July 1, 2021

Budget
Include a comprehensive budget and schedule with deliverables.

Questions
If you have questions concerning this RFP please submit them in writing by January 3, 2020, to NEWWA’s Executive Director:

Ms. Kirsten King
New England Water Works Association
125 Hopping Brook Road
Holliston, MA 01746
kking@newwa.org

Questions and answers will be posted on newwa.org as they are received. A link will be live on the left hand side of the home page.

Selection Criteria
• Demonstrated ability to transfer all data from existing AMS database into the new software platform.
• Demonstrated ability to create customizable data storage and/or modules for databases with the number of records comparable to NEWWA’s current system.
• How the vendor plans to accomplish NEWWA's project objectives and goals.
• Qualifications of project team and assigned dedicated project manager.
• Ease of software customization as well as software flexibility for growth.
• Schedule of work/timeline.
• Demonstrated capacity to do the work.
• Appropriate and relevant knowledge, skills, and experience.
• Previous experience with educational associations or small to medium-sized associations.
• Creative approach for custom items.
• Cost.

Additional Terms
A response to this proposal does not create any agreement between vendor and NEWWA and does not create any commitment on the part of NEWWA.

If a contract is awarded, NEWWA reserves all options regarding the terms of the contract and
will establish the terms at the point of issuing a contract.

NEWWA reserves the right to amend or cancel this RFP at any time prior to the submittal deadline. All material submitted regarding this RFP becomes the property of NEWWA.

If a prospective vendor includes any information in a proposal that it wishes to keep confidential, it shall clearly identify such information in the proposal.