Chicago Area Runners Association (CARA)

Request for Proposals

Association Management/Database Software System

Issued by Becki Suthers

Membership and Communications Manager

June 30, 2011

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Request for Proposals

Association Management/Database Software System

The Chicago Area Runners Association, hereinafter referred to as "CARA," will contract with a vendor(s) for the purchase and implementation of an association management/database software system. The system should house and manage all CARA membership data, program registration, race registration, donations, sponsors, and volunteers as outlined in this RFP.

CARA will keep responses in confidence as well as reserves the right not award any contract for an association/database software system.

BACKGROUND OF ORGANIZATION

CARA is a non-profit organization devoted to expanding, motivating, supporting, and celebrating the running community of Chicagoland. CARA connects runners to resources that enable them to run farther, faster, better for life. As the nation's third largest running organization, CARA serves runners from Chicago and its surrounding suburbs. CARA's work can be divided into four pillars: Membership, Racing, Training and Advocacy.

Membership At its core, CARA is a membership organization, serving nearly 9,000 runners from Chicago and its surrounding areas. CARA members receive discounts on CARA training programs and entry fees at nearly 100 races. In addition, CARA members receive discounts at the 60+ CARA Community Partners. These partners represent a wide variety of retailers, health care providers, and more. Members also have access to all of the racing, training, and advocacy benefits mentioned below.

Racing includes our services to runners and race directors. Each year CARA certifies more than 100 races; ensuring events are well organized and safely run. Runners can look for the CARA Certified logo as a stamp of approval. CARA also encourages high levels of competition through the Runners' Choice Circuit. The Circuit is a series of races, chosen based on runner feedback, staff, and board input. Runners compete on the circuit by racing a certain number of events. Those runners with the best performance win year-end awards. CARA members also benefit from exclusive race day amenities including gear checks, tents, and more.

Training encompasses our many training programs throughout the year. In any given year, CARA holds more than 14 different training programs for runners of all abilities. It is our goal to introduce people to the sport, to help them achieve more, and to help them run injury free. CARA partners with NovaCare Rehabilitation to provide our runners the best in injury prevention and care with a free 24-hour injury prevention hotline. CARA also offers charity discounts and trains charity runners to help support the mission of Chicagoland non-profit organizations.

Advocacy includes the organization's efforts to ensure Chicago and its suburbs remain a great place for runners. CARA works on things like clean air initiatives and with the Chicago Park District to maintain and improve the conditions on the Lakefront Path. The CARA Road Scholars program also falls under the umbrella of CARA's advocacy efforts. The Road Scholars Program is an innovative approach to inspiring excellence in Chicago youth. This intervention program challenges underprivileged teens to train for and complete a half marathon. Road Scholars uses running to teach youth important lessons in commitment, dedication, goal setting, and discipline, while improving self-esteem and worth. Teens train with dedicated school staff and adult volunteers who serve as mentors.

PURPOSE, DESCRIPTION, AND OBJECTIVES

Purpose

CARA is currently using a custom build Microsoft Access database and application to manage all of its member data. This tool has served the organization well over the years, but organizational needs have grown. With a new AMS/CRM/database software system, CARA hopes to incorporate all key membership, volunteer, sponsor, and training registration data. CARA must be able to migrate all current data over into a new system. CARA intends to retain our current membership identification numbers.

Description

Develop a user-friendly AMS/CRM/database system that is easily maintained and updated. CARA staff must be able to pull reports from the system in a commonly used format such as Excel. The system must house several pieces of data which fall into the following buckets:

- **Membership**

    o First name

    o Last name

    o Multiple Mailing Addresses, with the ability to designate the current or primary address

- o Multiple Email Addresses, with the ability to designate the current or primary address

- o Phone numbers, with the ability to designate the type and current or primary number

- o Birth date

- o Multiple Running Club Affiliations, with the ability to designate the current or primary

- o Multiple Charity Affiliations, with the ability to designate the current or primary

- o Employer, with the ability to store changes in employer and to designate the current or primary

- o CARA Membership Number

- o CARA Membership Expiration Date, with the ability to see all membership periods, renewals and types

- o CARA Membership Type (8 types): individual, family (covering multiple family members under one membership), youth, senior, individual with donation – three levels

- o Tracking of Runners' World Subscription Status (included in membership)

- o Donor Status

  - ▪ Yes/No

  - ▪ Amount Donated

  - ▪ Year(s) Donated

  - ▪ Donor Follow Up Section (to track follow up with donors)

- o Volunteer Status

  - ▪ Yes/No

  - ▪ Volunteer Positions Held with start and end dates

- **Training**

  - o Program Attended

  - o Year Attended

  - o Running Pace

  - o Position (participant, group leader, site coordinator)

- o History
- **Contacts**
    - o Sponsors
    - o Community Partners
    - o Race Directors
    - o Businesses/Corporations

The database solution must also have a self-serve web based application that is accessible to our membership via a membership login linked from CARA's website. CARA currently does not have this capability, so proposals must outline recommendations or provide solutions on how this integration could happen. With the new solution, members should be able to print temporary membership cards, update their contact information, register for programs, register for events, purchase CARA items, indicate email preferences, and join/renew their membership. *See attached example from the USA Triathlon website.*

It must improve internal efficiencies and allow staff to pull reports on different segments of the organization's membership. The reporting must be flexible enough to grow with staff needs.

The new system must interface with other software programs to handle member registrations and training program enrollments. CARA currently uses SignMeUp for the event and program sign-up transactions, which are then uploaded to the database by the staff. We would like to eliminate the need for SignMeUp and all data should be immediately available to CARA staff upon completion of transaction. Furthermore, proposals must detail how it will be able to interface with the CARA online merchant account. CARA does have free events that require registration. All events and programs should be handled in the same interface and users should be allowed for the free events and for fee events in the same interface. Non-members are allowed to register for events for a higher non-member rate.

CARA uses QuickBooks for our financial management. While not required, an optional integration should be included in the proposal.

See attached document detailing more information about the priority of each of these items and additional notes.

Objective

The organization's primary objective in completing this task is to become a more member friendly organization and improve internal efficiencies. CARA's new and existing members should be able

to update and renew their information online as well as register for training programs, volunteer opportunities and other activities which would directly feed into the database and eliminate double entry by CARA staff. Our goal is to provide our members with an easier, quicker membership process. It's also important that our staff have a more reliable way to complete their work.

TIMELINE

RFP Distributed:	June 30, 2011
Intention to submit and all questions due to CARA	July 8, 2011
All submitted questions will be answered and provided to those intention to submit	July 15, 2011
Deadline for RFP Responses:	August 1, 2011
Invitations for Formal Presentations:	August 15, 2011
Vendor Demos/Presentations	August 29 – September 2, 2011
Selection of Vendor/Contract Negotiation:	September 16, 2011
Software Implementation, Database Migration, and User Training:	October – November 2011
Software Operational:	December 1, 2011

AVAILABLE TECHNOLOGY RESOURCES / INTEGRATION ISSUES

- Needs to completely replace or interface with SignMeUp or a similar product.

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- Must include a web based interface to allow members to manage their own profile information and register for programs and events while providing the staff real time access to changes and transactions

- All existing data from current database needs to be migrated over to the new solution, including the maintaining of the existing membership ID/number.

- Membership self-service access should mirror current CARA branding standards.

BUDGET

CARA has a modest budget for this project but would like proposals to outline 2 scenarios: 1) basic fulfillment of CARA's requirements; and 2) Enhanced services/components based on contractors experience that would be appropriate for CARA to consider. Also, if there are any additional costs for website integration, please outline that separately.

Finally, as CARA is a nonprofit, please identify if there is any special nonprofit pricing or reduced fees. Further details can be discussed during contract negotiations.

PROPOSAL GUIDELINES AND REQUIREMENTS

Vendor Selection and Contract Award

CARA will conduct the selection and contract award in the following manner:

- This document will be distributed to all interested vendors. This is an open and competitive process.

- Proposals will be received and evaluated as described in this RFP. Selected vendors will be asked to demonstrate their product and/or make oral presentations to CARA.

- Proposals received after the deadline will not be considered.

Schedule for Evaluation Process

RFP Distributed:	June 30, 2011
Deadline for RFP Responses:	August 1, 2011
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Additional Notes

Vendors are welcome to submit alternate solutions, if it feels the alternate solution is the best route for CARA's current needs. If the work outlined in your proposal requires the hiring of sub-contractors, this must be clearly stated in your proposal. You must identify sub-contractors and the work they will complete. The process of ongoing maintenance and updates by selected contractor and approximate costs must be outlined.

Given the strong tie to CARA's website, CARA will entertain proposals that outline a website update, including a CMS solution, with a separate budget.

CONTRACT TERMS

Term of Contract

The initial contract term for this software will be negotiated at the time of contract award. All contracts are subject to review by CARA legal counsel. The project will be awarded upon agreement of the contract.

Right to No Award

CARA reserves the right to reject all proposals, reject portions of any proposal, or accept the proposal deemed most advantageous to CARA.

Cancellation

Should the vendor fail to meet the requirements of the contract, CARA may cancel the contract with a thirty (30) days notice and award the remainder of the contract term to the next best vendor.

PROPOSAL FORMAT

To facilitate the evaluation of the proposals, vendors shall utilize the following proposal format:

Cover Letter Referencing the RFP

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Company Background

Vendor shall provide a brief (one page) company description, history, number of employees, and financial status.

Proposal

Vendor shall outline its proposed solution, including features, benefits and identify any unique or distinctive features of the solution. The vendor shall also speak to its ability to meet the timeline, terms and conditions outlined in this RFP. Do not include any pricing in this section.

Questions and Answers

Vendor shall provide detailed answers to the questions contained in the RFP.

Proposal Costs

All costs incurred by the vendor in preparing the proposal, or costs incurred in any other manner by the vendor in responding to this proposal will be solely the responsibility of the vendor.

References

Contractors must supply three (3) references (business, contact information, date of work) and a brief summary of work.

All materials and documents submitted by the vendors in response to this RFP become the property of CARA and will not be returned to the vendor.

PROPOSAL SUBMITTAL

Preparation and Submittal

Vendors will prepare proposals in compliance with all of the instructions outlined in the RFP. Partial or incomplete proposals will be rejected. A vendor official with legal authority to bind the vendor must sign the proposal in ink. All proposals must be firm for acceptance within 180 days following the proposal opening.

Number of Copies and Contact Information

Please submit three original copies and an electronic copy (on disk or via email) of your proposal, including all supporting documentation, to:

Becki Suthers

Chicago Area Runners Association

549 W. Randolph, Suite 704

Chicago, IL 60661

312.666.9836 ext. 12

becki@cararuns.org

Please contact Becki Suthers at 312.666.9836 ext. 12 or via email at becki@cararuns.org to confirm your intention to provide a proposal and with any questions about the RFP prior to July 8th, all answers will be distributed to those expressing intention by July 15th.

QUALIFICATIONS

All vendors submitting proposals must meet the following minimum requirements at the time of proposal submittal to qualify for consideration:

Business Operation

Vendor must have operated a business providing similar service and support for a minimum of three (3) years.

Business Compliance

Vendor must be in compliance with all city, county, and state business licensing, bond, and insurance requirements.

In addition, vendors should answer the following questions:

- Provide references for three former or current clients with a similar scope of work. Include company name, address, contact name, and telephone numbers, work completed, and duration of relationship.

Company Overview:

Provide contact information for the principle individual(s) to be contacted regarding the information in this RFP.

- o Provide a brief history of the company and locations of corporate headquarters and offices.

- o How long have you been in business? How long have you been providing software and services in the non-profit sector, particularly with membership organizations?

- o Are you a private or publicly traded company? Provide evidence of your company's financial stability and projected longevity.

- o What differentiates your organization from your competitors?

Product Overview:

- o Provide an overview of your client management software system. Attach any relevant marketing materials and data sheets.

- o Describe the user interface and system navigation features. How is your interface and navigation superior to those of your competitors?

- In what ways can your system be customized?

- Describe user help features built into your system.

EVALUATION STANDARDS

The following criteria will be used to evaluate each RFP response:

- Technical capability

- Software capability

- Hosting capability with documented uptimes and backup capability

- Functionality

- Vendor support, responsiveness, and follow-up

- Ease of use

- Flexibility and ease of product implementation

- Implementation plan and support

- Pricing

- Timely and complete response to RFP

- Vendor client references

- Results of requested demonstrations and presentations