



**Association for the Advancement of  
Sustainability in Higher Education**

**AASHE Conference, 2011**

Prepared October 25, 2010

Proprietary and Confidential

**REQUEST FOR PROPOSAL**

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## PURPOSE OF THE REQUEST FOR PROPOSAL

AASHE has developed this Request for Proposal ("RFP") to identify and select one or more third parties to perform professional services work for the AASHE 2011 Conference. The activities include:

1. Developing or Customizing an Abstract Management System
2. Developing or Customizing an Event Management System

AASHE is seeking to identify and select one or more outside independent organization(s) to perform the activities listed above. AASHE prefers to have the two systems developed or customized by vendors with extensive expertise and welcomes separate proposals for the development of each system.

The remainder of this document provides additional information that will allow a service provider to understand the scope of the effort and develop a proposal in the format desired by AASHE. AASHE is seeking proposals to deliver any or all of the activities listed above.

It should be noted that AASHE attempts to do its work using best sustainable practices and holds the same expectations for its vendors and contactors.

## PROPOSAL CONTACTS

*Any questions regarding contractual terms and conditions or proposal format must be directed to:*

Danielle Gaines  
Events Manager, AASHE  
danielle.gaines@AASHE.org  
859.258.2551

*Any questions regarding system specifications must be directed to:*

Julia Kulla-Mader  
IT Manager, AASHE  
julia@AASHE.org  
859.258.2551

## DUE DATES

An email confirmation of the vendor's intent to respond to this RFP is required by Friday, October 29, 2010.  
**All proposals are due by 12 p.m. MST on Monday, November 5, 2010.** Any proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.

## RFP SCHEDULE

- |                                                        |                      |
|--------------------------------------------------------|----------------------|
| • RFP distribution to vendors                          | October 25, 2010     |
| • Written confirmation from vendors with bid intention | October 29, 2010     |
| • Questions due from vendors about scope or approach   | October 25-29, 2010  |
| • Responses to vendors about scope or approach due     | October 25-29, 2010  |
| • <b>Proposal due date</b>                             | November 5, 2010     |
| • Target date for review of proposals                  | November 1-12, 2010  |
| • Final vendor selection discussion(s) <b>Week of</b>  | November 15-19, 2010 |
| • Anticipated decision and selection of vendor(s)      | November 23, 2010    |
| • Anticipated commencement date of work                | December 6, 2010     |

## LAUNCH SCHEDULE

- |                                           |                    |
|-------------------------------------------|--------------------|
| • Abstract system launches                | February 1, 2011   |
| • Registration system opens               | March 1, 2011      |
| • Abstract review process begins          | March 1, 2011      |
| • Abstract review process complete        | April 1, 2011      |
| • Abstract data uploaded to AASHE website | September 15, 2011 |
| • Contract ends                           | November 30, 2011  |

**Note: AASHE offices will be closed between December 24, 2010 and January 2, 2011.**

## INTRODUCTION AND BACKGROUND

AASHE is looking for a reliable, cost- effective, user-friendly registration and abstract management system for AASHE 2011. AASHE will consider proprietary and open-source solutions, as well as a custom programmed web application.

The AASHE staff encountered a number of problems with the registration and abstract system implemented for the 2010 conference. These issues include but are not limited to:

- Software bugs and crashes after launch
- Lack of quality control and testing protocols
- Unexpected additional costs
- Inflexible customer service
- Lack of summarized data and statistics available

## VENDORS

AASHE is looking to develop a long-term relationship with a vendor(s) that meets the following objectives:

- Prioritizes customer service and user-centered design
- Promptly addresses system bugs and breakdowns
- Has [consistent values](#) with AASHE
- Adheres to timeline constraints and is flexible for problem solving (including extra time budgeted for problem solving)
- Can work within the AASHE budget
- Can provide training for AASHE staff who will use the system

## ABSTRACT SYSTEM

AASHE is looking for an abstract system where potential presenters can successfully submit abstracts for AASHE 2011 and through which AASHE can easily facilitate the abstract review process and prepare a conference program. The abstract system should:

- Be reliable
- Allow for the online review of abstracts by a review committee. Specifically, allow for a blind review based on categories with opportunities for rating and comments
- Allow for different types of abstracts (panel, paper, student summit, etc.)
- Provide tools to facilitate matching reviewers to abstracts
- Allow for dynamic reporting including:
  - Exporting abstract data into a database
  - Outputting a program with session times and dates and conflicts of interest
  - Reports that can be based on different purchased components
  - Reports that include payment status (paid, payment pending, have not paid)
  - Modifying and outputting new versions of a program schedule (*lower priority*)
- Enable sessions to be broken down into five, 10 and 15-minute increments
- Let AASHE send emails to conference registrants and presenters
- Include logic to prevent scheduling overlapping sessions and/or speakers
- Enable multiple AASHE staff to use the system with different access levels
- Have the following user functions:
  - Users can distinguish between author and presenter and other roles
  - Non-attendees can enter information for abstract submitters
  - Users can have multiple roles (example: presenter and author)
- Allow for a customized visual design that is consistent with the AASHE family of websites (*lower priority*)

- Handle uploading/exporting of presentation materials (*lower priority*)

## REGISTRATION SYSTEM

AASHE is looking to develop or select a conference registration system where attendees, sponsors, exhibitors, and presenters can successfully register for and participate in AASHE 2011. The registration system should:

- Be reliable
- Let attendees easily register themselves for multiple events
- Allows for form validation with custom logic so that attendees can fill out the correct information and avoid registration errors
- Prevent AASHE from overbooking the event
- Accommodate different registrant types (participant, exhibitor, sponsor, student, etc.) and dependencies
- Allow for non-traditional registration methods (group registration, administrative assistant registering for an employer, VIP registration, accepted presenter registration, etc.)
- Include payment processing that is compatible with Authorize.net
- Securely store credit card and registrant information
- Integrate with AASHE's XML-RPC service to retrieve member status
- Be used for other AASHE event registrations that occur outside of the annual conference (example: Curriculum workshop)
- Let users sign up for a waitlist when an event or activity is full and allows auto-notification when space is available
- Allow for passkey integration with an online hotel registration system
- Enable multiple AASHE staff to use the system with different access levels
- Allow for a customized visual design that is consistent with the AASHE family of websites (*lower priority*)
- Let AASHE measure email campaign success using tools such as the open rate (*lower priority*)

## CONTACT INFORMATION

### EVENT ORGANIZER

|                                    |                                                                              |
|------------------------------------|------------------------------------------------------------------------------|
| Event Name:                        | AASHE 2011                                                                   |
| Event Host Organization:           | AASHE, Association for the Advancement of Sustainability in Higher Education |
| Key Contact Person:                | Danielle Gaines, Events Manager                                              |
| Mailing Address:                   | 1536 Wynkoop St., Suite B500                                                 |
| City, State, Zip:                  | Denver, CO 80202                                                             |
| Phone:                             | 859.258.2551                                                                 |
| E-mail Address:                    | danielle.gaines@ashe.org                                                     |
| Web Address:                       | conf2011.ashe.org ( <i>in progress</i> )                                     |
| Preferred Method of Communication: | Telephone, Email                                                             |

### HOST ORGANIZATION BILLING ADDRESS

|                            |                                 |
|----------------------------|---------------------------------|
| Billing Contact Person:    | Allison Jones, Business Manager |
| Billing Address:           | 213 1/2 N. Limestone St.        |
| City, State, Zip:          | Lexington, KY 40507             |
| Country:                   | USA                             |
| Billing Contact Telephone: | 859.258.2551                    |
| Fax:                       | 859.258.2264                    |

## EVENT PROFILE

### EVENT INFORMATION

|                          |                              |
|--------------------------|------------------------------|
| Event Name:              | AASHE 2011                   |
| Event Host Organization: | AASHE                        |
| Event Start Date:        | October 9                    |
| Event End Date:          | October 11                   |
| Event Location Selected: | Yes                          |
| Event Location(s):       | Pittsburgh Convention Center |
| City, State, Zip:        | Pittsburgh, PA 15222         |
| Country:                 | USA                          |
| Facility Name:           | Pittsburgh Convention Center |
| Facility Contact Name:   | Debbie Smucker               |
| Facility Phone:          | TBD                          |
| Facility E-Mail Address: | TBD                          |

## INTRODUCTION AND BACKGROUND, Cont.

### EVENT OVERVIEW

Event Frequency

Yearly (Beginning 2010)

Event Overview (*mission, philosophy, etc.*):

- Significantly advance sustainability in higher education, with an emphasis on “next steps”
- Highlight the need to consider all components of sustainability in decision-making
- Provide for active exchange of ideas and knowledge through interactive forums, informal networking, and open discussion

Event Objectives:

- Foster cross-sector collaborations and build a learning community that includes all stakeholders
- Provide members with opportunities to share best practices, present their work to peers, and to network with one another.
- To highlight STARS as AASHE’s premier collaborative rating tool for campus sustainability, with standards by which institutions may measure themselves and qualify for different levels of recognition.
- Use AASHE conference as a platform for increasing membership numbers and educate attendees about AASHE benefits.

Market Segment:

Association, Educational, Non-Profit, Sustainability Focus

Expected Total Event Attendance:

2000-2500

Attendee Demographics Profile:

25% University Students, 50% Faculty/Staff/Administrators of Higher Ed Institutions, 25% Businesses and NGO’s

Accessibility/Special Needs:

Meeting ADA requirements, possible ASL interpreter

### EVENT HISTORY

|                      | Event 1                           | Event 2              | Event 3                    |
|----------------------|-----------------------------------|----------------------|----------------------------|
| Year                 | 2006, Inaugural Event, (Biennial) | 2008 (Biennial)      | 2010                       |
| Facility Name        | AZ State University               | Raleigh Conv. Center | Colorado Convention Center |
| City, State, Country | Tempe, AZ, USA                    | Raleigh, NC, USA     | Denver, CO                 |
| Start/End Day & Date | Oct 4-6, 2006                     | Nov 9-11, 2008       | October 10-12, 2010        |
| Total Attendance     | 650                               | 1700                 | 2000+                      |
| Total Abstracts      | 250                               | 500                  | 700                        |

## **GUIDELINES FOR PROPOSAL PREPARATION**

### **PROPOSAL SUBMISSION**

Award of the contract(s) resulting from this RFP will be based upon the most responsive vendor(s) whose offer will be the most advantageous to AASHE in terms of cost, functionality, and other factors as specified elsewhere in this RFP.

AASHE reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential vendor
- Accept other than the lowest priced offer
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers
- Award more than one contract to meet the needs of the scope of work presented in this RFP
- Conduct negotiations to develop the most advantageous outcome for the association

Vendor proposal(s) shall be submitted in several parts as set forth below. The vendor will confine its submission to those matters sufficient to define its proposal and to provide an adequate basis for AASHE's evaluation of the vendor's proposal.

In order to address the needs of this procurement, AASHE encourages vendors to present separate proposals for the abstract and registration systems. AASHE will also consider hiring different vendors for each system. AASHE will only consider proposals vendors located in the United States and Canada.

Vendor proposals and this RFP will be incorporated into the final agreement between AASHE and the selected vendor(s). Submitted proposals are suggested to include each of the following sections:

- Executive Summary
- Scope, Approach and Methodology
- Project Deliverables
- Project Management Approach
- Detailed and Itemized Pricing
- Appendix: Company Overview, References, Project Team Staffing
- Appendix: Vendor Questionnaire

The detailed requirements for each of the above-mentioned sections are outlined below.

## **DETAILED RESPONSE REQUIREMENTS**

### **EXECUTIVE SUMMARY**

This section will present a high-level synopsis of the vendor's responses to the RFP. The Executive Summary should be a brief overview of the engagement, and should identify the main features and benefits of the proposed work.

### **SCOPE, APPROACH, AND METHODOLOGY**

This section should include a description of each major type of work being requested of the vendor. All information that is provided will be held in strict confidence.

### **PROJECT DELIVERABLES**

This section should include descriptions of the types of reports used to summarize with detailed information for projected budgets. Include sample reports as attachments to the proposal to provide an example of the types of reports that will be provided for this engagement.

### **PROJECT MANAGEMENT APPROACH**

This section should include the method and approach used to manage the overall project and client correspondence. Briefly describe how the engagement proceeds from beginning to end with a brief timeline. Include the total staff assigned to each project including any monthly breakdown where increased staff involvement is needed. Additionally, please describe the technical knowledge of the staff AASHE will communicate with most frequently and the process for resolving client disputes. Lastly, please explain how you build quality assurance into your project management approach.

### **DETAILED AND ITEMIZED PRICING**

This section should include a fee breakdown, including percentages, by project phase and estimates of all projected expenses and relevant dates. Include discounts for 501(c)3, multi-year contracts, and clear discounts if multiple projects are awarded.

### **APPENDIX: COMPANY OVERVIEW, REFERENCES, PROJECT TEAM STAFFING**

- Provide the following for your company:
  - Official registered name (Corporate, D.B.A., Partnership, etc.), address, main telephone number, toll-free numbers, and fax numbers
  - Key contact name, title, address (if different from above address), direct telephone and fax numbers
  - Person authorized to contractually bind the organization for any proposal to this RFP
  - Brief history, including year established and number of years your company has been offering event related sustainable services
- Provide three current nonprofit or higher education references for which you have performed similar work and a description of the scale and scope of the work
- Include professional biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of staff assigned to this project by providing biographies for those staff members

### **APPENDIX: VENDOR QUESTIONNAIRE**

- Describe your experience building/customizing abstract management systems and/or event management systems
- What factors do you see as contributing to your ability to meet the deadlines outlined in this proposal? If you think this is an unreasonable timeline, please explain and offer an alternative timeline
- Describe your approach to customer service and client satisfaction
- What experience does your staff have with using web services? Describe a previous project where web services were employed
- Describe your testing/quality assurance process. How do you verify that a system is bug free?

- Will AASHE Conference Staff be able to talk directly to your developers?
- Describe how system works for different user roles and permissions levels
- If you are submitting a RFP for the abstract system, please include an example abstract report and an explanation of how it was generated

## **EVALUATION FACTORS FOR AWARD**

### **CRITERIA**

Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the vendor's responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a vendor(s):

- Completion of all required responses in the correct format
- The extent to which vendor's proposed solution fulfills AASHE's stated requirements as set out in this RFP
- An assessment of the vendor's ability to deliver the indicated service in accordance with the specifications set out in this RFP
- The vendor's stability, experiences, and record of past performance in delivering such services for nonprofit member associations in the higher education field
- Availability of sufficient high quality vendor personnel with the required skills and experience for the specific approach proposed
- Strength of product demonstration during the sales process
- Overall cost of vendor's proposal. Pricing as compared to the project budget and to other proposals
- Vendor experiences working with similar organizations
- Vendor dedication to an inclusive process and commitment to open source solutions
- Terms and conditions

AASHE may, at their discretion and without explanation to the prospective vendors, at any time choose to discontinue this RFP without obligation to such prospective vendors.

## **SCOPE OF WORK**

### **REQUIREMENTS**

The following information should be used to determine the scope of this project and provide pricing for this engagement.

#### **1. AASHE ABSTRACT MANAGEMENT SYSTEM**

- Abstract Submission
  - Users can submit an abstract themselves or on behalf of someone else
  - Users submitting an abstract can later register for the conference
  - Users submitting an abstract can distinguish between roles (presenter, author, etc.)
  - System supports auto-emails to users confirming abstract submission
  - System supports email opt-out
- Abstract Evaluation
  - System supports blind reviews of abstracts by a review committee
  - Systems provides tools to facilitate matching reviewers to abstracts
  - System supports auto-emails to users notifying of proposal status

- Reporting and Scheduling
  - Abstract data can be exported in CSV and/or XML format
  - System can output a schedule with session times, dates, and conflicts
  - System can output a revised schedule when changes are made after the close of abstract review (*lower priority*)
  - Sessions can be broken down into five, 10 and 15-minute increments
- Administration
  - System supports multiple administrator roles with different access levels

## **2. AASHE CONFERENCE REGISTRATION SYSTEM**

- Attendee Registration
  - System offers different registration paths for different registrant types (participant, exhibitor, sponsor, student, etc.)
  - System can accommodate non-traditional registration methods (group registration, administrative assistant registering for boss, VIP registration, accepted presenter registration)
  - Registration system can be used for future AASHE events such as the curriculum workshop
  - System supports auto-emails to registrants
  - System supports email opt-out
  - Registration data can be exported in CSV and/or XML format
- Third-party system integration
  - Can integrate with AASHE's XML-RPC service to retrieve member status
  - Payment processing is compatible with Authorize.net
  - Allows for passkey integration
- Administration
  - System supports multiple administrator roles with different access levels

## **3. PROJECT MANAGEMENT EXPECTATIONS**

- Communication of expectations, delays or milestones
  - Regular communication schedule
    - Bi-Weekly Calls to identify progress toward meeting deliverables
    - As needed calls, at least once a week when systems are live to address any bugs or complex needs
- Budget, timeline and account management
  - Utilizing reports, agreed upon by both parties, for account management, tracking, and reconciliation
  - Detailed sponsorship budget to include projected timeline of solicitation and procurement
  - No shared accounts will be utilized between AASHE and third party vendor
  - AASHE reserves the right to request NET and GROSS reporting for all reconciliation
  - Timeline includes ample opportunity for system testing