



NATIONAL ASSOCIATION OF
STATE TREASURERS

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Secretariat

The Council of

State Governments

Request for Proposals for Membership Services Questionnaire

Date Issued: March 16, 2009

I. INTRODUCTION

Background

The National Association of State Treasurers (NAST) encourages the highest ethical standards, promotes education and the exchange of ideas, builds professional relationships, develops standards of excellence and influences public policy for the benefit of the citizens of the states. Membership is composed of all state treasurers, or state finance officials with comparable responsibilities, from the United States, its commonwealths, territories, and the District of Columbia. In addition, NAST has three affiliated organizations, the College Savings Plans Network (CSPN), the National Association of Unclaimed Property Administrators (NAUPA) and the State Debt Management Network (SDMN).

Headquartered in Lexington, Kentucky, NAST is recognized as a national force whose work has influenced public policy at both the state and federal levels. NAST is instrumental in developing and promoting standards of excellence regarding ethical conduct, policy guidelines and accountability, and model legislation and regulations. The NAST Office of Federal Relations in Washington, D.C. provides a resource for state treasurers to communicate concerns on pending legislation and regulatory actions by federal agencies.

NAST is a 501(c)6 nonprofit organization.

Invitation to Bid

NAST is requesting proposals from interested survey and research firms to design, implement, analyze, and report the findings of an association membership services survey to the membership and staff of NAST.

Goals and Objectives of the NAST Member Survey

NAST would like to survey a sample population of its members consisting of state treasurers, principal members of the three affiliated organizations of NAST, associate members of all four organizations and corporate affiliate members, to determine:

- Identify the level of satisfaction with current member services/benefits.
- Determine the additional value of new member services/benefits.
- Decide which programs are not valued by the membership and can possibly be terminated.
- Position NAST to better serve the diverse members of the organization, its three networks, and corporate affiliates.
- Target potential programs and initiatives for future development.
- Assist NAST leadership and staff in prioritizing services/benefits.

Scope of Services

The following provides a general overview of the specific work assignments. The vendor will need to complete a comprehensive action plan for how the vendor would approach each of the items listed below and the budget page should itemize the cost for completing each item listed.

NAST is seeking a vendor to assist the association in achieving the goals and objectives listed above. The scope of work will include:

- Consult with NAST leadership and staff regarding the launch of the project.
- Develop a Membership Services Survey for NAST and the three affiliated organizations.
- Implement primary survey through electronic means.
- Possibly conduct supplemental follow-up with random sample of member via telephone.
- Analyze survey.
- Provide survey outcomes in the form of a report and a briefing to the leadership.

Proprietary Information

Any and all information provided to proposers is to be considered proprietary information and is to be used solely for the purpose of responding to this RFP. Such information is not to be released to any party outside the proposer's organization without the explicit written consent of NAST.

Issuing Officer

This RFP is issued on behalf of NAST. The following individual will serve as the sole point of contact from the date of release of this RFP until a contract is awarded:

Kore Donnelly
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2760 Research Park Drive
Lexington, KY 40578
Tel: (859) 244-8175
Fax: (859) 244-8001
Email: kdonnelly@csg.org

II. DESCRIPTION OF REQUIREMENTS

Proposal

The proposal should be concisely written and address the following areas:

- Company and staff background information
- Action plan for scope of services
- Timeline for completing scope of services
- Budget
- Proposals cannot be longer than five (5) pages – supplemental information such as biographies may be included in an appendix.

Company background Information – the following information must be provided

1. Name of agency
2. Federal tax identification number
3. Business address and phone number
4. Principle contact (phone and email address)
5. Brief description of your operation as you would describe it to prospective clients.
6. Please indicate the year the agency was founded. Has it operated continuously since that time?
7. List the key personnel assigned to work with NAST.
8. Please submit an organizational chart of your staff by title and indicate the number of full-time professionals. In addition, attach biographies of the principals and staff proposed to work on this project.
9. List all services offered by the agency, excluding those which are subcontracted. Please provide a list of subcontractors that may be used for this account.
10. List your top four clients with a brief description of the work you do for each account and indicate the following for each: client name, a reference contact and telephone number.

Action Plan/Scope of Work

Provide a project narrative which describes the vendor's overall approach including strategies and rationale. For each service requested please provide an overview of your approach, including your rationale for proposing any alternative strategies, and how you feel you could successfully implement the services requested.

Work Schedule

Provide a timeline that outlines project progress and completion dates for each of the itemized requirements in the scope of services.

Budget

Provide a comprehensive budget page on your approach to the projects listed in the scope of services and a cost for each component. Please describe the manner in which your agency receives compensation.

III. SCHEDULE OF EVENTS

Date	Event
March 16, 2009	RFP issued and distributed to potential vendors
March 30, 2009	Deadline for submitting written questions
April 6, 2009	Responses to written questions
April 13, 2009	RFP responses due by 3:00 P.M. Eastern
April 20, 2009	Deadline for initial evaluation of proposals
April 27, 2009	Completion of interviews and negotiations with finalists Review proposed survey questions
April 27, 2009	Notification of chosen vendor
May 4, 2009	Contract execution
TBD	Project completion date

Note: This Schedule of Events is subject to change.

Submission and Response to Questions

Written questions regarding the RFP may be submitted and must be received by the issuing officer before March 23, 2009. Questions must be submitted to the issuing officer by mail or electronic mail. Written responses to questions shall be sent on or before March 30, 2009.

Submission of Bid Proposals

Bid proposals must be submitted by mail or electronic mail and received by NAST on or before 3:00 PM Eastern Standard Time April 6, 2009. Any bid proposal received after this time will be rejected and returned. Vendors mailing bids must allow ample mail delivery time to ensure timely receipt of their bid proposals.

IV. EVALUATION CRITERIA

Corporate Information

Evidence of corporate maturity, fiscal stability and full-time senior and intermediate staff resources to mount and execute a survey research project of this size and scope.

Account Services

Past, current and prospective services demonstrating capabilities to mount and execute a survey research project of this size and scope. Particular attention will be paid to past and current services offered to nonprofit membership associations.

Account Team

Professional qualifications and work experience on similar project engagements of the account team members who will be primarily responsible for the majority of the work performed in the action plan.

Action Plan

An understanding of the scope of services to be performed and evidence of the capabilities and creativity necessary to perform the scope of services.

Cost of Services

Evidence that services will be reasonably priced and provide a good value to NAST.