



American Academy of Physician Assistants Request for Proposals

September 27, 2010

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Introduction

This Request for Proposals contemplates an award of a Firm-Fixed Price, Indefinite Delivery Indefinite Quantity (“FFP IDIQ”) Contract for a service provider for development and delivery of a comprehensive, browser-based online join and renewal mechanism as well as services that will integrate seamlessly with AAPA’s Association Management System, iMIS.

The American Academy of Physician Assistants (“AAPA”) will award this contract to the Offeror whose bid or offer is responsive to the solicitation and is most advantageous to AAPA, price and other factors considered. AAPA specifically notes that this contract may be awarded to an Offeror who does not propose the lowest cost, technically acceptable proposal for these services, but offers the best value to AAPA based upon AAPA’s evaluation of the proposals.

Background

The American Academy of Physician Assistants (AAPA) is the only national professional association representing Physician Assistants (PAs) across all medical and surgical specialties in all 50 states, the District of Columbia, Guam, the Armed Forces and the Federal services.

AAPA provides comprehensive support and advocacy for physician assistants so that they may provide patients with increased access to high-quality, cost-effective health care.

In order to achieve its strategic goals of annually increasing its membership, AAPA is seeking to automate its joining and renewal processes. Currently the AAPA “online” join process is, in actuality, a manual procedure that simply gives the appearance of being an online, automated process. A user enters their information into an online form created in Formsite which then emails the user’s information to AAPA’s Member Services department where it is manually keyed into iMIS. Further complicating this process, the form is insecure and results in credit card information being transmitted while unencrypted. This creates the following problems:

- New members experience a delay in their ability to access membership benefits despite the appearance of joining instantaneously
- The processing time by Member Services is excessive leading to a high number of member complaints
- Payment information is transmitted in an insecure and unencrypted fashion

Additionally, the form itself provides little to no guidance for the user to determine the relevant member category and is not integrated with iMIS.

AAPA is seeking a fully-integrated, online solution in order to streamline the member join and renewal process for both prospective and active members as well as AAPA staff. Specifically, automating these processes will serve to alleviate new member discontent by providing instant access to membership benefits such as CME, event registration and store discounts. Contemporaneously, AAPA staff productivity will increase automation of currently manual processes thereby shifting their focus from data entry to customer service for members.

Membership is the key to AAPA’s identity and mission. Therefore, it is essential that the online join and renewal mechanism be as intuitive as possible for prospective and renewing members who are seeking the efficiency of an online process. Allowing members to complete a membership application online or renew their membership with ease is critical to breaking down the barriers between thought and action and allowing AAPA to capitalize on the user’s immediate interest.

Contract Scope

The Offeror shall propose to furnish all personnel, facilities, support and management necessary to provide the services required under this solicitation. The scope of this effort is defined in the Statement of Work ("SOW").

Objectives

The principal objective of this project is to develop and deliver an online join and renewal mechanism that fully integrates with our Content Management System (CMS) and iMIS, AAPA's Association Management System. The mechanism will allow customers to self-select the relevant membership category and provide instant access to AAPA's secured, member website. Access to all member benefits will be granted upon payment. AAPA requires this mechanism to support its strategic objectives of increasing membership by providing efficient joining and membership renewal capabilities.

Statement of Work

Audiences

AAPA serves many different audiences. The online join and renewal mechanism will serve differing audiences including, but not limited to:

- Physician Assistants (practicing, non-practicing, retired)
- Students in PA programs
- Supervising Physicians
- Health professionals
- Individuals enrolling in a PA program
- PA related government employees
- AAPA staff and leadership
- Representatives of businesses selling products/services to PAs

Functional Requirements

AAPA requires an online join/renewal mechanism meeting the following requirements:

Functionality

The resulting online join and renewal mechanism shall provide:

- General:
 - Support for all standard web browsers including, but not limited to, IE 7 and up, Firefox 3 and Safari
 - Selection of membership categories
 - Ability to join chapters or sections
 - Collection of selected demographics to be determined in the planning phase
 - Expired members whose expiration date is at least one year in the past follow the join path rather than renewal
 - All demographic data will pull from iMIS database if populated
 - Validation will be applied on all fields
 - All fields will have format and standard rules applied, i.e., validating addresses in accordance with post office regulations, as determined during the planning phase
 - The online join and renewal mechanism will be launched via a link that can be placed anywhere in content or on a button. This link will also be able to be used in event registrations or other iMIS Initial Public View pages. A "return url" will also be provided so that after joining or renewing the user will be re-directed back to their point of origin.

- The join date will be populated if it is empty on a new join, but will remain unchanged if already populated in iMIS
- Benefits page content will change based on new versus renew and by type. For example, subsequent pages will have differing text based on renewal versus new, i.e., “Please confirm your demographic data” on a renewal versus “Please complete the form” for a new join.
- “Print Invoice” will be a standard form.
- Blind copy all emailed receipts to the membership mailbox
- Renewal application will not handle a student deceleration, meaning if a student’s membership is expired and they attempt to renew, the content page will direct them to call the Member Services department
- Dues:
 - Dues calculated and paid in real-time using VeriSign based on membership category
 - Ability to designate voluntary contributions, which can be added to the dues billing
 - One cart/single checkout - New applicants will receive member pricing for other purchases and pay dues simultaneously.
 - Instant access to member-only benefits are granted upon payment authorization
- Duplicate Reduction Functionality:
 - If customer already has a record in the database and is a member of AAPA, they will be prompted to either renew their membership or login
 - If the customer has a record in the database and is not a member, a pre-populated form is displayed for updating personal and professional information.
 - If the customer is not found in our database, an electronic form will launch to collect personal and professional data.
- Optional - Content on all pages will be editable through WCM

Business Process Flows can be found in Appendix A

General Design Parameters

The online join/renewal mechanism must integrate seamlessly with AAPA’s iMIS 15.1.3 installation. The mechanism shall:

- Use iMIS Business Objects (iBOs)
- Be written using .NET web services
- Provide real-time integration with iMIS 15.1.3; updating Name, Name_Address, Name_Fin, Trans, Subscriptions, Activities, and UD tables appropriately.
- Use stored procedures that can be edited/updated as the organization grows/changes.

Accessibility/Usability

The software infrastructure modules must be compliant with Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended by the Workforce Investment Act of 1998 (P.L. 105-220), August 7, 1998.

Usability testing should occur to validate specifications.

Hardware Specifications

The infrastructure must be compatible with AAPA’s current networking architecture as well as its current version of iMIS 15.1.3.

AAPA's iMIS Hosting Environment

Web Server (Production):

OS: Windows Server 2003 SP2
Model: DELL PowerEdge 1950
Memory: 4 GB
Processor: 8 x Intel Xeon 2.5GHz
Hard drive: C drive: 278.8 GB Free Space: 209.6 GB

Web Server (Development):

OS: Windows Server 2003 Enterprise
Model: Virtual Server running on AAPA-VM02
Memory: 2 GB
C drive: 50 GB Free Space: 29 GB

Database Server:

Microsoft SQL Server 2005

Available Technology Resources

AAPA will make available to the Offerer testing and development environments for the proposed online join and renewal mechanism as well as:

- One Project Sponsor – Jhannet Marantonio
- One Program Manager/iMIS analyst – Tressé French
- One Subject Matter Expert – Queirra Rankin

Design Services

AAPA requires design services to ensure an intuitive user-experience throughout the join and renewal process.

Terms and Conditions

Small Business, Minority Owned Firms and Women's Business Enterprises

AAPA will utilize small businesses, minority-owned firms, and women's business enterprises, whenever possible and to the fullest extent practicable.

Cost or Price Analysis

AAPA will perform a cost or price analysis in connection with this procurement action. Price analysis may be accomplished in various ways, including the comparison of price quotations submitted, market prices and similar indicia, together with discounts. Cost analysis is the review and evaluation of each element of cost to determine reasonableness, allocability and allowability.

Past Performance

Each Offeror shall submit information regarding its three highest dollar value contracts or subcontracts performed within the last two years from the date of this solicitation. The contracts provided should represent work of a similar nature to what is being requested. The information shall include name, address and telephone number of the person in charge of administering the contract or subcontract along with information regarding the type of contract; the services performed or material provided; and the relationship between the services performed or the material provided under the listed contracts and subcontracts and the services to be performed or materials to be provided under this solicitation.

The Offeror shall include a release in its proposal authorizing AAPA to contact each of the individuals in charge of administering the contracts or subcontracts listed in its proposal and receive information regarding the performance by the Offeror on the contract or subcontract.

Failure to include sufficient contact information or an appropriate release authorizing AAPA to contact the individuals in charge of administering the contracts or subcontracts listed in the Offeror's proposal may be grounds for the proposal to be disqualified for award.

Works for Hire

The successful Offeror will agree that any deliverable work, and any intellectual property rights in such work, originally produced or composed by the successful Offeror, its agents or employees as part of its duties under this contract shall be work-for-hire and the sole property of AAPA.

The successful Offeror will agree to execute and deliver, or to require that its employees or agents execute and deliver any instruments that may be necessary to affect the rights of AAPA, or its designees, with respect to any such work. In the event any such work is determined not to be a "work for hire" under the copyright law, the successful Offeror will assign to AAPA a copyright in the work, including without limitation, all right, title and interest therein, in perpetuity.

The successful Offeror will agree that all documents prepared or obtained under the contract, including, but not limited to, basic notes, sketches, charts, diagrams, diskettes, and other data prepared or obtained under the contract shall become the property of AAPA upon suspension, abandonment, termination or completion of the Agreement. The successful Offeror shall have the right to retain file or other working copies of such items; provided, however, that any derivative works shall belong solely to AAPA.

Review and Approval

The final product of all Task Orders is subject to the review and approval of AAPA prior to payment.

Task Order

All work will be assigned to the successful Offeror on a Task Order basis, with due dates for deliverables to be specified at the time of the Task Order assignment. AAPA may, in its discretion, issue Task Orders for only part of the work listed in the Task Specifications. Neither this Request for Proposals nor the resulting contract guarantees that Task Orders will be issued for all of the work listed in the Task Specifications.

Instructions to the Offerors

Designation of Representative

The Offeror shall provide the following information regarding the primary point of contact for AAPA regarding this solicitation:

- Name
- Title
- Address
- Phone
- Fax
- EMail

The Offeror may submit written changes to the Designation of Representation to AAPA during the evaluation of the offers.

Confidentiality/Nondisclosure

The Offeror shall specifically label any information submitted in response to this Request for Proposals considered to be Proprietary Information with the legend “proprietary” or “confidential.” AAPA, its employees, agents and representatives will not disclose to others without prior written consent of the Offerors any Proprietary Information received in response to this Solicitation.

Representations and Certifications

The Offeror shall include the following representations and certifications in its proposal:

Organizational Conflicts of Interest

The Offeror shall certify that it did not participate in the development or drafting of the specification, requirements, and statements of work or the request for proposal. The Offeror shall further certify that there is no conflict of interest between the work contemplated by the solicitation and the Offeror’s other activities. The Offeror shall advise AAPA in writing of any conflict of interest that arises during the evaluation phase of this solicitation.

Small Business, Minority Owned Firms and Women’s Business Enterprises

The Offeror shall affirmatively state in its proposal if it is a small business, minority owned firm or a women’s business enterprise.

Past Performance

The Offeror shall include a release in its proposal authorizing AAPA to contact each of the individuals in charge of administering the contracts or subcontracts listed in its proposal and receive information regarding the performance by the Offeror on the contract or subcontract.

Financial Stability

The Offeror shall represent and warrant that it is financially stable and will be financially able to perform the contract.

Personnel

The offeror shall identify “Key Personnel” in its proposal by providing resumes of proposed key personnel required to perform this contract. “Key Personnel” shall mean those individuals who are recognized by AAPA and the Offeror as essential to the successful completion and execution of any task authorized. “Key Personnel” shall include, but not be limited to, the individuals who will have direct responsibility for the development of the online join and renewal mechanism.

Once the contract is awarded, any substitution or reassignment of the Key Personnel shall be made with persons of equal abilities and qualifications and shall be subject to AAPA’s prior written approval.

Design Services

The offeror shall provide a description of the design services offered. The description shall include but not be limited to descriptions of design methodologies as well as any design standards utilized by the offeror, i.e., use of colloquial English labels for buttons, no more than three fonts in use, and/or use of legible fonts.

Planning Services

The offeror shall provide a detailed description of its proposed methodologies for the planning phase of this project.

Proposed Enhancements

A proposed enhancement could include, among other things, a superior technical solution or a unique way of completing the project more efficiently. All proposed enhancements will be evaluated by AAPA to determine if the enhancement provides added value to AAPA.

The Offeror shall utilize an “*” to designate any proposed enhancements.

Proposed Timeline

The following is AAPA’s desired timeline. However, the Offeror may suggest another timeline with the understanding that AAPA is seeking an aggressive delivery date and time to delivery will be a consideration in vendor selection.

- Proposals due – October 6, 2010
- Proposal award date – October 11, 2010
- Project Planning/Design Phase Begins – October 13, 2010
 - Setup Development Environment
 - Build Out Prototype
 - Test/Review/Modify Prototype
 - Finalize Page Content/Design/Labels
 - Final Testing
 - Launch Planning
- Proposed Deployment – November 26, 2010

Format for Proposals

The Offeror must submit a response for every requirement of this RFP, failure to do so will be considered non-compliance and the proposal will be rejected. The Offeror shall make use of the following organization for their submitted proposals:

1. Executive Summary
2. Technical Volume
 - Development process: explain the process the Offeror will follow to build the online join/renewal mechanism, including major milestones and evaluation
 - Address usability standards and testing
 - Address any important technology information and specifications used in the Offeror’s solution (languages, platform)
3. Management Volume
 - Organizational structure: communication process; including lines of reporting and any special tools used.
 - Schedule of deliverables; include major milestones and testing proposal.
4. Budget Volume
 - Budget volume should be labeled “Proprietary Pricing Information.”
 - Break down cost by production hours, tools and functionalities
 - Other charge areas: Please identify whether there will be other expenses, i.e., consulting fees to complete this project.
5. Attachments
 - A statement of qualifications and experience

- Resumes of all who will work on account
- At least three (3) Professional references with current addresses and telephone numbers.

Questions

Any questions that the Offeror has regarding the solicitation may be submitted in writing to AAPA's designated point of contact only. AAPA will respond to these questions in writing via email and provide a copy of the answers to the questions to all the offerors. AAPA will not reveal the name of any Offeror to any other Offeror. AAPA will not discuss the solicitation either in person or by telephone with any Offeror. After receipt of the proposals, AAPA may determine it necessary to clarify an Offeror's proposal and may initiate contact with an Offeror for clarification questions or for negotiation purposes.

Minimum Bid Acceptance Period

The Offeror agrees that its offer shall remain in full force and effect for a period of 90 days from the date of the receipt of the proposals by AAPA. This minimum acceptance period may be extended by agreement between AAPA and the Offeror.

AAPA Point of Contact/Place of Acceptance of Proposals

Offers and all written questions shall only be submitted to:

Attention: Ms. Jhannet Marantonio
 American Academy of Physician Assistants
 950 North Washington Street
 Alexandria, VA 22314
 E-mail: jmarantonio@aapa.org

Contacting individuals employed by AAPA other than the designated Point of Contact may result in an offer being determined to be ineligible for award.

Period of Acceptance of Bids

Offers must be received by Ms. Jhannet Marantonio no later than 5:00 p.m. Eastern Time on October 6, 2010. AAPA will accept electronically submitted proposals to jmarantonio@aapa.org.

Time of Performance

AAPA anticipates issuing Task Orders for specific services contemplated by this solicitation. Each Task Order will provide the time of performance.

Incomplete Proposals

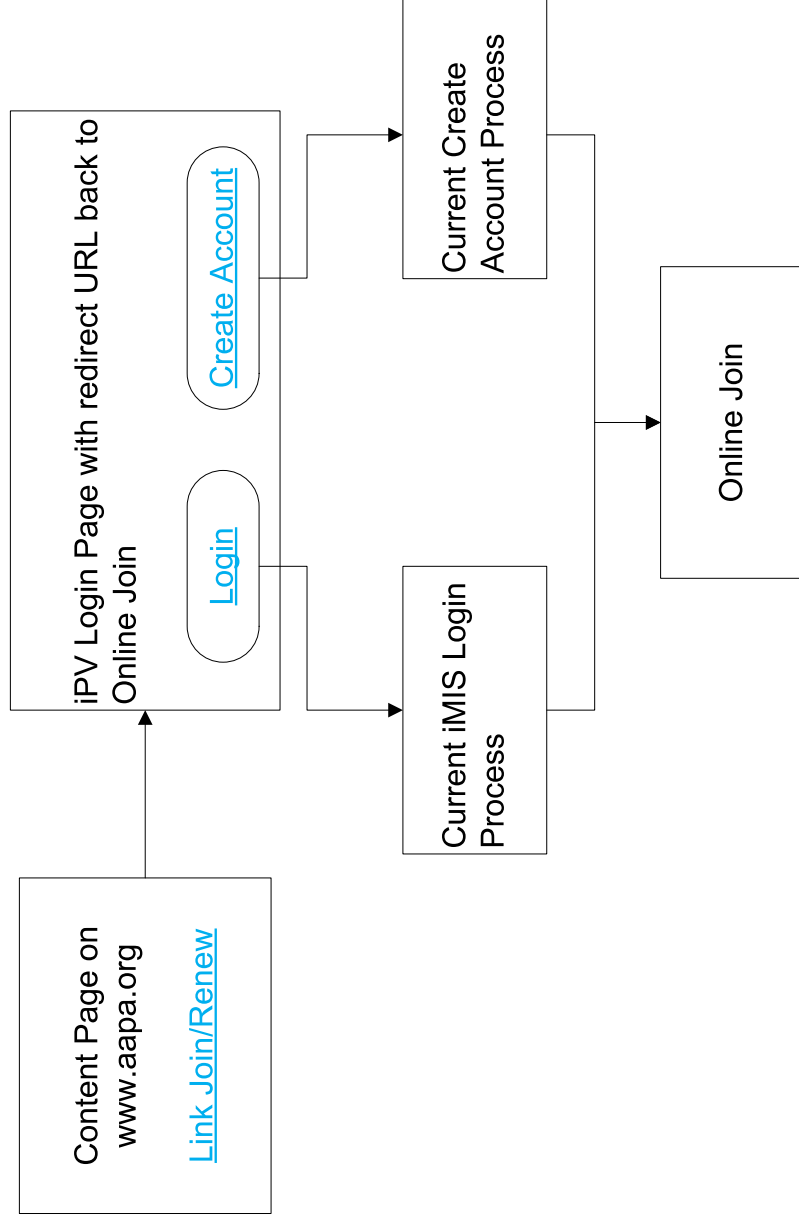
The failure to fully respond to all parts of this solicitation, including but not limited to the required representations, certifications and warranties, may result in an offer being determined to be ineligible for award.

Proposals – Signed and Dated

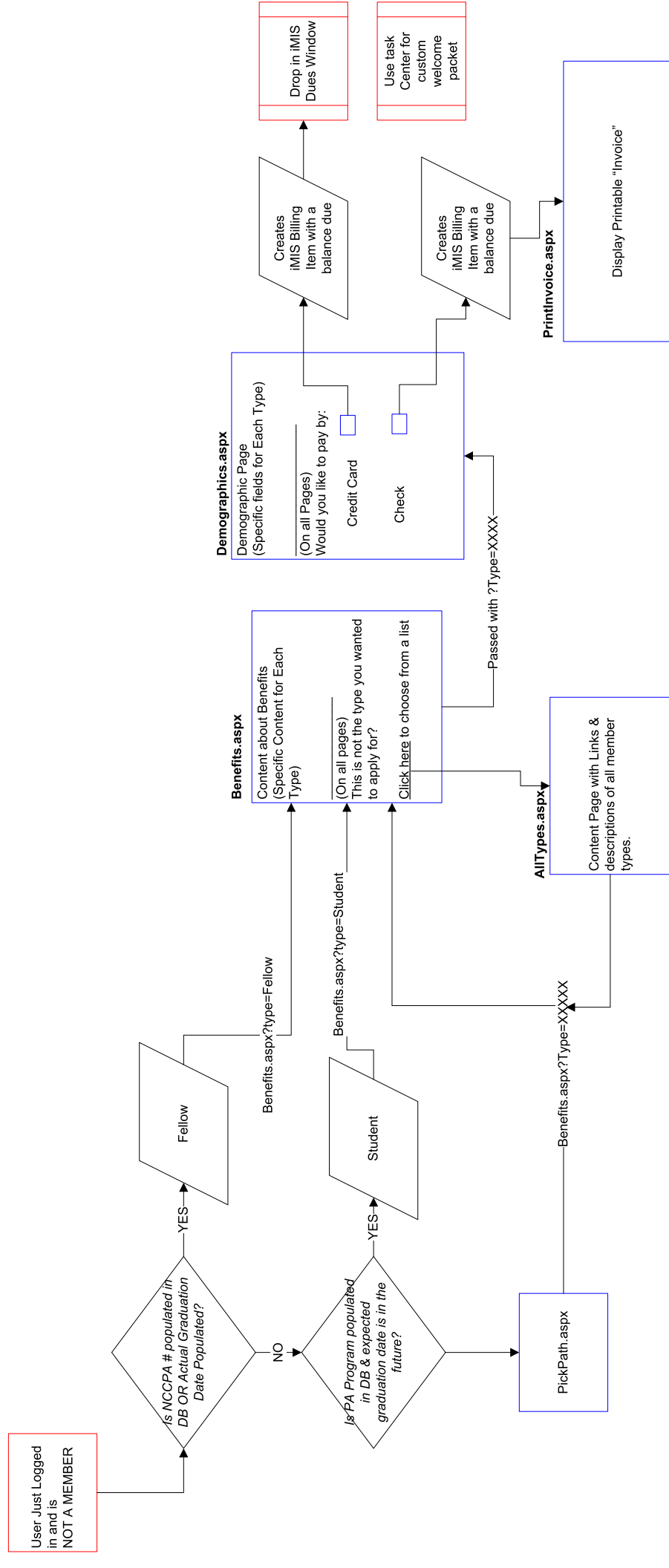
All proposals submitted must be signed and dated by a representative of the Offeror duly authorized to legally bind the Offeror in contractual agreements. The representatives typed name, title, address, and phone number shall be typed below the representative's signature.

Appendix A – Process Workflow Diagrams

Online Join: Login/Create Account Workflow



Online Join: New Member Workflow



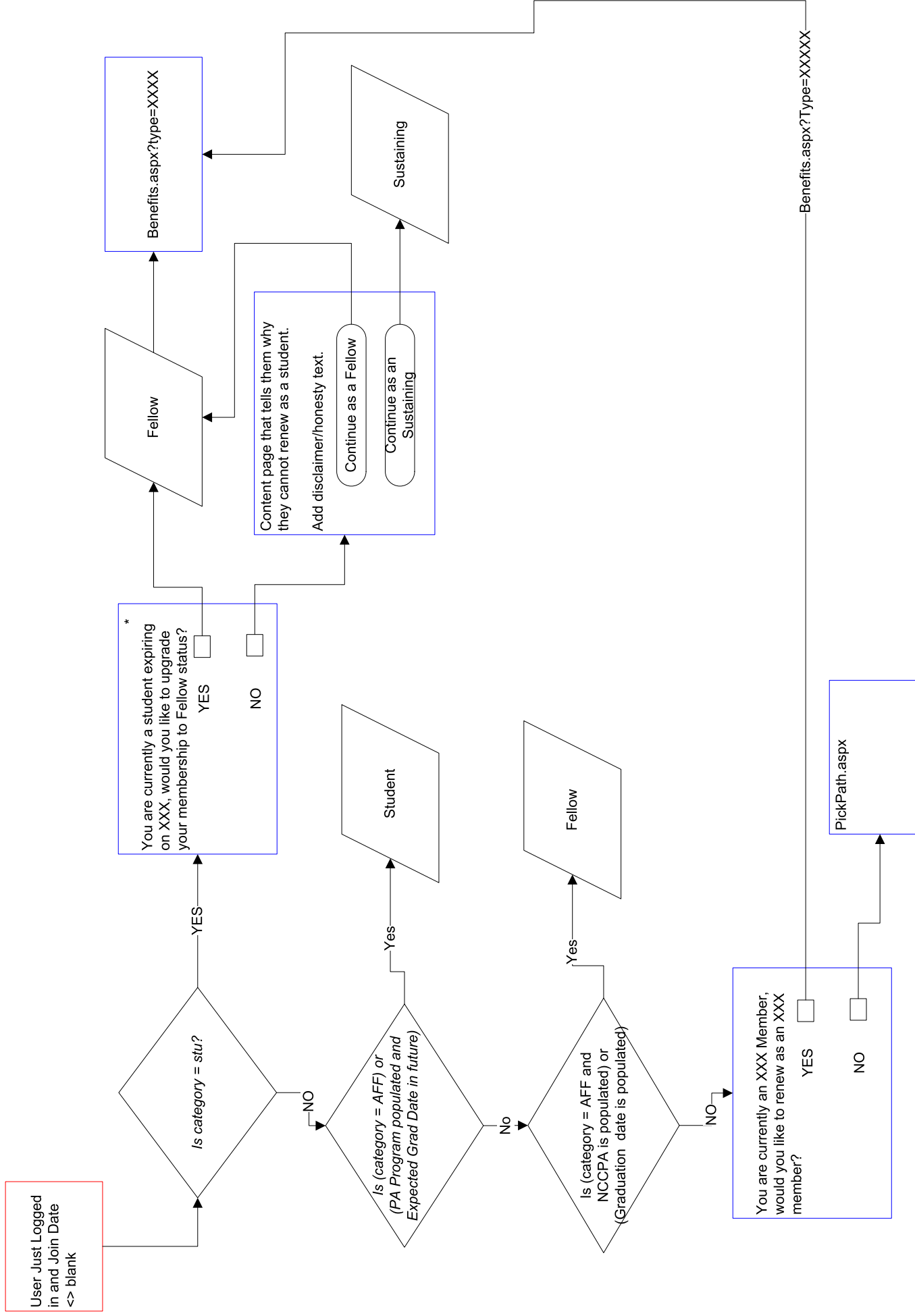
Legend:

Blue: Custom Built Page

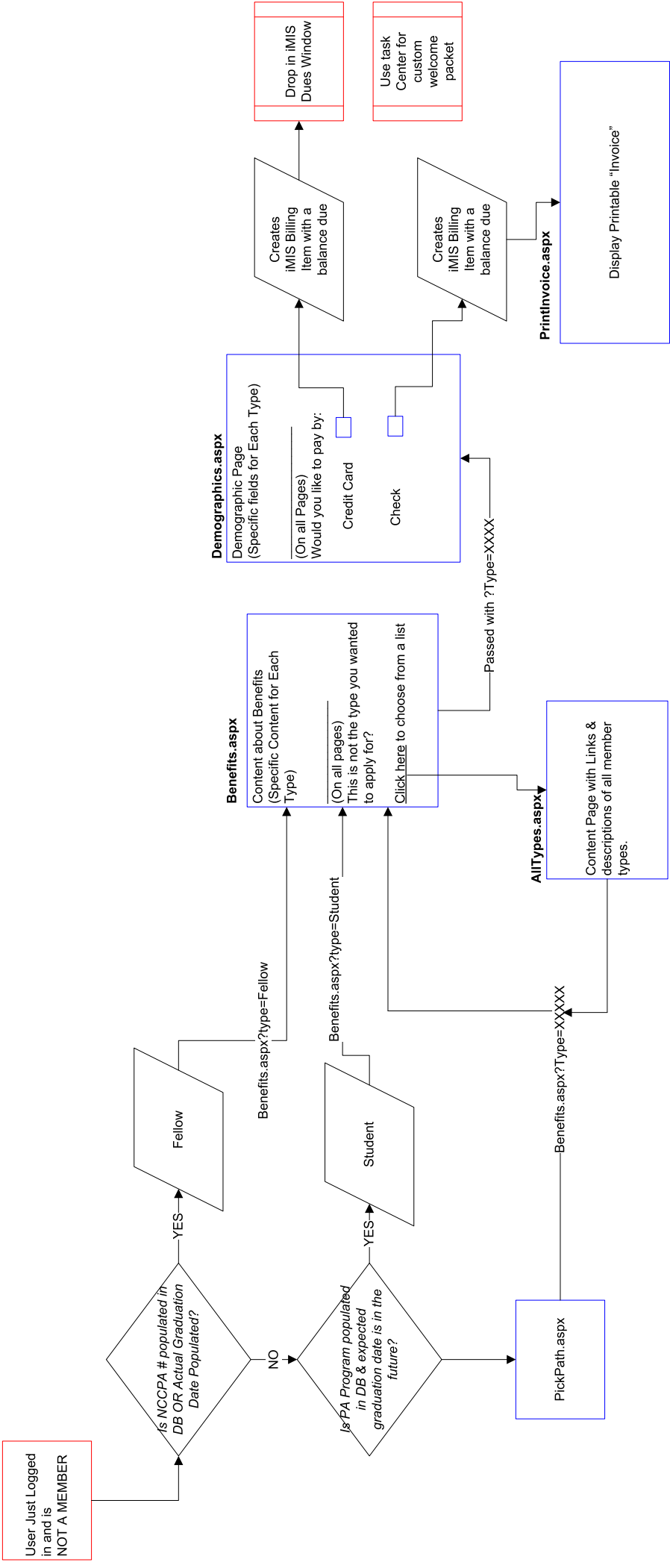
Red: Current IPV Functionality & Pages

Black: Decision or Electronic Process

Online Join: Renewing Member



Online Join: New Member Workflow



Legend:

Blue: Custom Built Page

Red: Current IPV Functionality & Pages

Black: Decision or Electronic Process

Online Join: Renewing Member

