



National Association of State Budget Officers

Website Renovation and AMS/CMS Integration Project

Prepared by: Brian Cheung
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Acronyms

Acronym	Description
NASBO	National Association of State Budget Officers

1 INTRODUCTION

The National Association of State Budget Officers is a 64-year-old professional association representing the staff of executive budget offices from the fifty states and territories. NASBO provides its members with education and information from its Washington, DC office. NASBO hosts 3-5 meetings per year, publishes the Fiscal Survey of States semi-annually, the State Expenditure Report annually, and other publications on varying schedules. Each week, NASBO emails its members and publication subscribers the "Washington Report & NASBO News," "Washington Report Bulletin," and "NASBO State Budget Press Clips". NASBO's website is locally hosted and features information on current and past publications, meetings and trainings, a members-only online directory, and an online discussion forum. The NASBO website is the primary medium through which the Association communicates with and disseminates information to its members.

1.1 Contact Information

Brian Cheung
Project Coordinator
National Association of State Budget Officers
444 North Capitol Street, NW
Suite 642
Washington, DC 20001

Phone: (202) 624-8433
Fax: (202) 624-7745
Email: bcheung@nasbo.org

1.2 Proposed Schedule

2008

September – October	Open submission of proposals
October 17-19	NASBO Fall Meeting; General meeting of Executive Committee and Advisory Group to discuss project
November 30	Deadline for proposal submission
December	NASBO Staff and Advisory Group discuss proposals, promising practices from websites of similar associations, desired functionality, etc. through conference calls and webinars
December 26	Final proposal selection

2009

March 27	Target date for unveiling of new website/AMS
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1.3 Hardware and Software Overview

Software

- Operating system: Windows XP SP3
- Word processing: Microsoft Office 2007
- Database: Microsoft Access 2007 / MySQL (for NASBO|Connects)
- Graphics: The GIMP
- Internet Access: IE7 / Firefox v3

Hardware

- 6 PC's
 - Pentium4 2.4 GHz
 - 512 MB RAM
- 2 PC's (web server, exchange server)
 - Microsoft Windows Server 2003 R2 SP2
 - Intel Xeon 3.00 GHz
 - 2.00 GB RAM

2 OVERVIEW OF NASBO SERVICES AND ACTIVITIES

2.1 Meetings and Trainings

NASBO hosts 3-5 meetings each year. The Spring, Annual and Fall meetings draw average attendance of 50-100 members. The majority of participants are NASBO members, with the remainder consisting of sponsors, guests (for the Annual meeting), and non-member attendees. The Introduction to State Budgeting Seminar (for new budget analysts) has a restricted size of 75-85 participants and is open to both associate members and non-members. All meetings feature multiple speakers as well as meal functions. The Spring, Annual and Fall meetings may also feature special events, such as networking excursions and guest programs.

NASBO manages all logistics with regards to the meetings and trainings. NASBO staff develops the agendas, secures speakers, prepares handout materials, designs and manages registration (both on-line, by fax, and by mail), prepares badges and nametags, assembles meeting binders for participants, negotiates contracts with hotels, and more.

In addition to meetings and trainings, NASBO hosts a series of conference calls and webinars for its members throughout the year that provide additional opportunities for members to share promising practices and discuss relevant and important topics. Pre-registration is currently not required for these conference calls.

2.2 Website

NASBO's website contains current and past publications, a directory of NASBO members organized by both state and program area (available only to NASBO members), an online discussion forum (utilizing PHPBB3), as well as information on all of its upcoming meetings and trainings. The NASBO homepage presents information on new (recently hired/appointed) members, the leading headline for the current edition of the "Washington Report & NASBO News", a listing of current meetings and their registration status (open for registration or not), and a feature area for the current edition of the Fiscal Survey of States and the State Expenditure Report.

Content on the website that is deemed "Members Only" is protected by a username and password – the same username and password are used by all members. In contrast, each member has a unique login for NASBO|Connects, the online discussion forum for NASBO members. This forum contains sub-forums organized by the most common budget staff assignments.

2.3 Publications & Communications

NASBO generates multiple publications. Twice a year, NASBO publishes the Fiscal Survey of States. Survey instruments are distributed to the states via an Excel spreadsheet. A designated individual from each state will fill out the spreadsheet and submit it either by email or fax. Once received, a NASBO staff member manually enters the data into various spreadsheets from which the final tables and figures are generated. The annual State Expenditure Report follows a nearly identical procedure for data acquisition and compilation.

In addition to the aforementioned annual publications, NASBO also generates issue briefs on an as-needed basis. These are distributed through email to NASBO members and are also hosted on the website.

2.4 Membership

NASBO's membership levels are very consistent year-to-year. Primary members consist of the top budget officers in each state's executive budget office; associate members consist of all analysts and administrative staff within the budget office. NASBO has nearly 160 primary members and over 600 associate members. Every employee of a state budget office is, by default, a member of NASBO. Dues are invoiced to and paid by the states and territories and not individual members.

3 SCOPE AND OBJECTIVES

3.1 Overview

NASBO seeks proposals for a web-enabled Association Management System that integrates seamlessly with the NASBO website. This website should be powered by a user-friendly Content Management System that allows for easy classification, organization and production of content.

3.2 Functional Requirements

Membership

- Track and manage members, associate members, and committees, as well as non-members and sponsors, all in one database.
- Have universal logins that allow individuals to manage their own profiles and access content according to security groups determined by the association.
- Offer a member directory, with the ability to generate listings according to state, program area, region, and other member criteria.
- Offer member discussion forums

Meetings and Events

- Offer online meeting registration on the NASBO site, and have the registration information be fully integrated with user profiles so that key registration form fields will auto-populate with profile data
- Accept credit cards and checks as payment for meeting registrations
- Offer a full NASBO event calendar

Communications

- Create and maintain distribution mailing lists from which recipients can subscribe/unsubscribe for electronic publications and newsletters
- Offer e-newsletters online that can be sent to mailing lists
- Offer RSS feeds for those newsletters
- Allow staff to generate surveys for site users to complete without technical assistance

Publications

- Offer an online store for publication sales with real-time processing of credit cards online and back-end entry of checks and other paper payment types
- Generate invoices
- Track publication downloads

Job Board

- Allow registered site users (controlled by security groups) and NASBO Staff to post jobs

Content Management/Search

- A Content Management System that is robust, flexible, and easy-to-use by non-technical personnel is critical to the new NASBO Web site's effectiveness.
- Integrated site search that gives prioritized results according to tags/keywords
- Upload image files to a photo gallery

Reporting

- Export data from the AMS system to a format that can be manipulated in Excel

4 VENDOR QUESTIONNAIRE

4.1 Details of Vendor

- What is your company's background and history?
- What experience does your company have working with associations? Please provide past associations with which you have worked as references.
- Please provide a list of client references, with emphasis on those located in the Washington, DC area.

4.2 Details of Vendor's Products

- What current products do you offer that are in line with this project's requirements?

4.3 Details of Vendor's Support Services

- What is the size of your current staff?
- What is the length of time during which you provide support for your products?
- In what format (phone, email, in-person, etc.) is your support delivered?

4.4 Details of Vendor's Costs

- Itemize costs for each product/component
- Include labor and material charges
- Include any recurring charges such as maintenance or hosting fees.

4.5 Details of Vendor's Proposed Solution

- Provide a basic (non-technical) summary of your solution.
- Your proposed timeline?
- Detailed (technical) explanation of proposed solution
 - Features and functionality
 - Proposed strategy for handling database, integration, and design aspects of project
 - Scalability
 - Technical and other requirements of NASBO staff
- Preliminary design ideas/concepts
- Proposed budget
- List of Deliverables