



REQUEST FOR PROPOSAL: MEMBERSHIP MANAGEMENT SYSTEM

ISSUED DATE: OCTOBER 18, 2022

SUBMISSION DATE: NOVEMBER 14, 2022

RFP Coordinators:

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INTRODUCTION

CUTA is hereby forwarding its Request for Proposals for the services described below. The objective of the project is to upgrade from CUTA's existing Membership Management System to a responsive and innovative cloud-based system that will meet our members' needs and enhance the end-user experience.

CUTA BACKGROUND

CUTA is a non-profit member-based association that supports public transit as the core of integrated mobility across Canada.

We are:

- The collective and influential voice of public transit in Canada.
- A member-based association that promotes transit's role at the core of integrated urban mobility (IUM).
- The "go-to" organization for information, trends, data, research, networking, training, events, and advocacy specific to transit.

At any one time we have about 500 members with 5700 active member contacts across Canada.

We provide our members with the resources, networking, training, events, data, research, and advocacy needed to support their success in the transit and urban mobility industry.

CUTA'S CURRENT TECHNICAL ENVIRONMENT

1. We are based in Toronto and Ottawa with 20 staff members
2. Currently CUTA uses iMIS, an ASI Solutions product as Membership Database
3. Informz is used for eblasts to communicate information to members. It is integrated with iMIS
4. We also have Member's Only Site (Library Management System) hosted by GHD on their SharePoint
5. Conference & Events registration, we use PheedLoop (Event Technology Service)
6. CUTA website is built and hosted on WordPress
7. TopClass LMS by WBT systems is used as a system to create and deliver training modules for members/non-members
8. We use MS Teams or Zoom to deliver Webinars to our members/non-members.

SCOPE OF WORK

Through this RFP, CUTA intends to acquire a software solution(s) that can implement, support, train staff and maintain all aspects of the Membership Management System by the proponent.

OBJECTIVES

In addition to improving internal/external organizational processes, functions and services, the Members Management System should enable the provision of services to CUTA's valued members most simply and comprehensively possible.

Here are the main management systems that should be covered:

- Membership Management System (MMS) – R
- Document Management System (DMS) – R
- Event Management System (EMS) – R

- Learning Management System (LMS) – K
- Bilingualism (English & French) – R
- QuickBooks – L
- Email Marketing – R
- Survey Application – R

Priority	Description
R - Required	This feature is required to participate in the RFP Process
L – Love to have	This feature is important to have to succeed
K – Like to have	This feature is valued, but not required

DELIVERABLES

1. Functional

- Support membership success & events staff with effective and efficient tools
- Convert member portal content to responsive (mobile web) format and organize by topics; offer options to filter/sort and keyword search.
- Capability of using Single Sign On (SSO)
- Create an optimized experience for both English and French audiences.
- Utilize a modern user interface that is intuitive and easy to use for all stakeholders (internal & external) e.g., users' login.
- Make it easy for members to renew their membership to ensure a consistent and predictable revenue stream.
- CRM functionality such as maintaining/containing common data elements for the management, reporting & linking to other data systems – contact information, communications tracking, accountabilities, outcomes, certificates, waivers, and other forms.
- Integrate with a leading customer relationship management (CRM) platform that allows CUTA staff to create campaigns and segment audiences to deliver personalized messages. Nurture sequences for prospects and conversion-focused campaigns for members.
- Contain custom reporting functions that help CUTA analyze users/members' data sets
- Have customizable interface for CUTA branding upgrades.

2. Service

- Ease of implementation and adoption of software into organization/current process – ongoing support from vendor throughout this process
- Have readily accessible 24x7 post development support available from vendor, when required
- Data migration support
- Training – Vendor must provide software training to staff and related training materials as toolkits, modules, manuals

Provided these deliverables above, Proponents should identify/demonstrate and supply a clear description of how their proposed software solution meets these needs outlined in this RFP. While this list of goals has been identified by CUTA as ideal, they are not expansive, and CUTA is open to additional or equivalent alternative

solutions. CUTA will evaluate each software solution on its overall ability to meet and align with CUTA's needs and budget requirements.

REQUIREMENTS MATRIX (To be completed by proponent)

Proponents to complete the following requirements table with one of the 3 options:

1. Yes (Proponent can provide this feature)
2. Partial (Proponent can provide this feature to an extent)
3. No (Proponent cannot provide this feature)

Requirements	Proponent Response
Integration with CUTA Website	
Tiered Membership	
Bilingualism (English & French)	
Cloud Based	
Auto Renewal	
Single Sign On	
Customer 360	
Report & Dashboard	
Survey Application	
Document Management	
Events Integration	
Social Media & Marketing Integration	
CRM Integration	
Customizable Interface	

INFORMATION FOR SUBMISSIONS

One electronic copy, Portable Document Format (PDF), of a submission is to be provided and must not exceed 10 pages, excluding relevant appendices, and project examples. Submissions shall include the following information:

1. General

- a) Name, address, telephone number, and e-mail address of the consultant
- b) Identification of all parties in a joint venture, including sub-consultants

2. Qualifications

- a) A general description of the qualifications of the firm must be provided
- b) Identification of members to be assigned to the project team, including any sub-consultants and relevant experience

3. Project Experience

- a) Brief documentation of at least 2 significant projects of similar size and scope, for a not-for-profit and bilingual association/organization with project description and proposed project team members' involvement and their respective roles, together with a brief description of any other projects of relevance, must be provided. Samples of relevant previous work are useful in demonstrating this experience and may accompany the submission in electronic format.
- b) Project experience should be mapped specifically

- c) 2 customer testimonials preferably from a not-for-profit and bilingual association/organization with projects of similar size and scope.

4. Project Methodology

- a) Documentation of proposed outline to undertake and complete the assignment. This should include, but is not limited to, methodology and resources outlined in the scope of work. This outline should also include proposed data sources.

5. Team Organization

- a) Organizational structure
- b) Responsibility matrix describing the role and accountabilities of each team member
- c) Resource allocation table (proportion of hours by individual staff members)

6. Costing

- a) CUTA relies on the vendor to come up with a high-level budget breakdown including consultation fee, software licenses, additional software purchases, support and maintenance fee, training costs, etc.
- b) The fee proposal shall be provided with sufficient detail as to describe the type and level of effort to be performed for each task
- c) If alternate methodologies are proposed, proponents should cost each of them separately and highlight any differences

7. Project Deliverables and Timelines

CUTA relies on the vendor to produce project deliverables and timelines to achieve those.

8. CUTA's Role

- a) Responsible for project management
- b) Organize working group who will be engaged and provide feedback of the project
- c) Provide meeting support between all working groups involved in the project
- d) Handle administrative approvals

9. Proposed Payment Schedule

CUTA relies on the vendor to propose a payment schedule.

10. Milestone Schedule

- | | |
|--|-------------------|
| a) Release of Proposal | October 18, 2022 |
| b) Pre-submission Bidder's Virtual Q&A | November 7, 2022 |
| c) Submission Date | November 14, 2022 |

Bidder's Virtual Q&A

Bidding parties that have questions regarding the RFP, must submit them in writing no later than Monday October 31st, 2022, 17:00pm, EST.

Questions can be forwarded to Alisha Goyal (goyal@cutaactu.ca)

All questions will be addressed during the Pre-submission Bidder's Virtual Q&A on Monday November 7th, 2022.

SUBMISSION GUIDELINES

Proposals will be accepted until November 14th, 2022, 17:00 EDT.

You will receive an acknowledgement of receipt by email. If you do not, contact Alisha Goyal (goyal@cutaactu.ca) immediately.

Proposals are to be submitted in electronic form as a Portable Document Format (PDF) to:

goyal@cutaactu.ca

This initiative requires qualified individuals to perform the services as outlined.

EVALUATION CRITERIA

Responses will be evaluated and ranked using the following criteria and weighting:

Evaluation Criteria	Points	Weight	Sub-Total
1. Functionality	0 to 10	2.0	20
2. Industry expertise & experience	0 to 10	1.5	15
3. Demonstrated customer service (support & quality)	0 to 10	2.0	20
4. Project management	0 to 10	1.0	10
5. Project deliverables & timelines	0 to 10	1.5	15
6. Costs	0 to 10	2.0	20
Total			100

1. Project Plan and Methodology

- Describe the approach to the provisions of the project services. Consideration is to be given to whether the team has:
 - Sufficiently broken-down tasks so that specific resources may be identified
 - Thoroughly understood the project requirements
 - Demonstrated a comprehension of the challenges and risks
 - Ensured that CUTA receives the best overall value
 - Proponents must outline the methodology for design and administration that will ensure successful completion of the project
 - Proponents must clearly identify all services included in the submission along with any optional, excluded or services assumed to be provided by others
 - Proponents shall identify major issues, challenges and risks associated with the project (if applicable)

2. Project Team and Experience

- Describe the composition, capabilities, and management of the proponent's project team. This should include the suitability, commitment and availability of team members who will be critical, with details on:
 - Relevant experience of team as a whole

- Relevant experience of team members individually
- Submission must identify which sub-consultants or specialists (if required) will be used and what their roles will be
- Submissions shall identify and provide an outline of the availability of project management staff and key personnel responsible for implementation of the project

3. Resource Allocation

- This describes the amount of time, effort, and cost to be spent on each deliverable
 - Submission shall indicate the appropriate allocation of skills and level of effort required of team members according to the work-plan for all phases of the work
 - A spreadsheet showing the allocation of hours (including sub-consultants) by individual for each project task is required

4. Project Control

- Submission should describe an effective project management plan that will ensure cost, schedule, quality, communication, and risk management needs are met
- Cost and project management (monitoring, reporting and control) techniques should be used that will be used during the project must be presented

Additional Notes

- Costs associated with the preparation of the proposal are the sole responsibility of the proponent and CUTA shall neither bear nor incur liability for such costs.
- Proposals received after the due date will **not** be accepted. Proposals are considered received upon reaching our offices (virtually – electronic copy by email). CUTA assumes no liability for difficulties experienced in transmission. Electronic submissions will receive acknowledgments via email. If no acknowledgment is provided regarding the submission by 5:00pm on the day of submission, then proponents must contact CUTA immediately.
- Any errors or inconsistencies in the Proposal shall be subject to CUTA's interpretation. CUTA's right to accept or reject any or all proposals, whether they conform to the Proposal documents or to cancel the Request for Proposal at any time prior to the Notification of Award is expressly reserved without liability to CUTA.
- At its discretion, CUTA reserves the sole right to discuss or clarify the Proposal of a proponent to satisfy itself as to the intent of a proposal. Proposals will be reviewed and may be short-listed for an interview.