

RFP SCORING TEMPLATE

FEATURES AND CAPABILITIES

SCALE OF IMPORTANCE

(4-Neccessity, 3-Prefer, 2-Beneficial,
1-Trivial, 0-Not Needed)

1.0.0 SOFTWARE FUNCTIONALITY

1.1.0 Membership Management

1.1.1	Members can maintain/edit their profile information	<input type="text"/>
1.1.2	System allows for custom member fields	<input type="text"/>
1.1.3	Ability to share a member directory online	<input type="text"/>
1.1.4	Member directory can be restricted to members only	<input type="text"/>
1.1.5	System allows for differentiating between members and non-members	<input type="text"/>
1.1.6	Ability to recognize when non-member becomes member and visa versa	<input type="text"/>
1.1.7	Identify and remove duplicate records	<input type="text"/>
1.1.8	Ability to handle member expirations	<input type="text"/>
1.1.9	System is able to process corporate memberships	<input type="text"/>
1.1.10	Member roster can be exported into Excel	<input type="text"/>
1.1.11	Access to member reports to track current, expiring and expired members	<input type="text"/>
1.1.12	Access to non-member reports to track their activity	<input type="text"/>
1.1.13	Access to reports of outstanding balances	<input type="text"/>
1.1.14	System allows for customizable member/non-member reports	<input type="text"/>
1.1.15	Take membership applications online	<input type="text"/>
1.1.16	Approve process of new members	<input type="text"/>
1.1.17	Download mailing labels	<input type="text"/>
1.1.18	Member private/secure login area	<input type="text"/>
1.1.19	Members are able to renew membership	<input type="text"/>
1.1.20	Ability to import member record	<input type="text"/>
1.1.21	Ability to integration member records with other AMS systems (i.e. APIs)	<input type="text"/>

1.2.0 Meeting & Event Management

- 1.2.1 Integrated event registration in platform
- 1.2.2 Members and non-members can register and pay for events online
- 1.2.3 Attendees can be checked-in at an event directly from the system
- 1.2.4 Early registration and late fee options
- 1.2.5 Differentiate between member and non-member pricing
- 1.2.6 System allows for vouchers/coupons for event ticket purchases
- 1.2.7 Ability to capture answers to questions when registering
- 1.2.8 Registration mobile app with easy payment option
- 1.2.9 Email event registration reminders
- 1.2.10 System allows for printing of event badges based on registrations
- 1.2.11 Reports of meeting & event attendees, no-shows, and revenue
- 1.2.12 Report on current revenue
- 1.2.13 Past meetings auto-archive
- 1.2.14 Add to calendar option
- 1.2.15 Social media sharing ability
- 1.2.16 Directions/mapping available
- 1.2.17 Ability to add documents/photos for specific meetings

1.3.0 Email Marketing

- 1.3.1 Mass email communication is available and integrated into system
- 1.3.2 Emails can be created and customized
- 1.3.3 Survey capability
- 1.3.4 System keeps track of email metrics: delivered, opens, clicked, and bounced
- 1.3.5 Ability to export email reports into Excel
- 1.3.6 Ability to schedule/automate emails

- 1.3.7 System allows for personalization of emails
- 1.3.8 System allows for segmentation of email lists
- 1.3.9 Opt-out of email features
- 1.3.10 Automated welcome emails for new members
- 1.3.11 Automated renewal notices
- 1.3.12 System allows for email forwarders/aliases
- 1.3.13 Require email opt-in function

1.4.0 Content and Website

- 1.4.1 Easy to use/editing of content on website
- 1.4.2 Offers responsive templates for mobile devices
- 1.4.3 Ability to custom create forms (ex: membership application, contact us, etc.)
- 1.4.4 Reports on website activity
- 1.4.5 Ability to use third party analytics platforms (ex: Google Analytics)
- 1.4.6 Event pages are dynamic and past events are auto-archived
- 1.4.7 Integrated blog
- 1.4.8 Integrated forum for members
- 1.4.9 Able to display external content (RSS feeds)
- 1.4.10 Social media integration
- 1.4.11 SEO meta data
- 1.4.12 Content/editing revision history available
- 1.4.13 System allows photo galleries
- 1.4.14 Search functionality
- 1.4.15 Use of custom/vanity domains

1.5.0 Ecommerce and Other Revenue

- 1.5.1 Ability to accept payments online
- 1.5.2 Compatibility with popular payment gateways (ex: PayPal, Stripe, Square, Authorize.net)
- 1.5.3 Ability to store payment method for one-click purchases
- 1.5.4 Integration with accounting software (ex: QuickBooks)
- 1.5.5 Ability to sell products
- 1.5.6 Able to manage and sell sponsorships
- 1.5.7 Support for classified ads and job postings
- 1.5.8 Revenue reports for non-dues revenue (ex: product sales)
- 1.5.9 Ability to issue refunds

1.6.0 Dashboard and User Access Control

- 1.6.1 System offers dashboards for at a glance view of chapter activity
- 1.6.2 Different access levels for admins based on their roles
- 1.6.3 Multiple admin users
- 1.6.4 Manage access permissions for different groups
- 1.6.5 Ability for system to logout based on timing/inactivity

2.0.0 PARENT ORGANIZATION MANAGEMENT AND OVERSIGHT TOOLS

- 2.1.1 Dashboard view of chapter activities
- 2.1.2 Unified (approved) design for chapter websites and emails
- 2.1.3 Standardized AMS functionality for all your chapters
- 2.1.4 Tools for your chapter liaison to monitor their chapters
- 2.1.5 Chapter membership reports

- 2.1.6 Chapter meeting reports
- 2.1.7 Chapter sales reports
- 2.1.8 Chapter website activity reports
- 2.1.9 Ability to set notifications and alerts for chapter changes
- 2.1.10 Ability to export reports in Excel
- 2.1.11 Ability to push content updates onto chapter websites
- 2.1.12 One centralized admin login to manage/view chapter websites
- 2.1.13 Unified (approved) design for chapter websites and emails
- 2.1.14 Standardized AMS functionality for all your chapters

3.0.0 SUPPORT

- 3.1.1 Online access to self-help knowledgebase
- 3.1.2 Onboarding to system support
- 3.1.3 On-demand video trainings
- 3.1.4 Live system trainings
- 3.1.5 Ticketing system
- 3.1.6 Phone support
- 3.1.7 Onsite training
- 3.1.8 Board transition system training
- 3.1.9 Ability to purchase additional support
- 3.1.10 Educational webinars
- 3.1.11 Graphic design support
- 3.1.12 Content writing support
- 3.1.13 Administration support
- 3.1.14 General chapter management best practices advise and guidance

4.0.0 TECHNOLOGY AND SECURITY

- 4.1.1 "All-In-One" chapter management system
- 4.1.2 Collection of multiple "best of breed" systems
- 4.1.3 Cloud-based software
- 4.1.4 Self-installed software
- 4.1.5 Custom software managed in-house
- 4.1.6 Constant service availability and protection monitoring
- 4.1.7 Continuous software enhancements and improvements
- 4.1.8 SSL encrypted for software and website
- 4.1.9 PCI compliant system
- 4.1.10 Regular PCI audit services
- 4.1.11 GDPR Compliant

5.0.0 VENDOR CONSIDERATION

- 5.1.1 Vendor reputation
- 5.1.2 Customer reviews/testimonials
- 5.1.3 Pricing of service for your chapters
- 5.1.4 Practical knowledge of Chapter Management
- 5.1.5 Industry knowledge of professional and trade associations
- 5.1.6 Length of time in business
- 5.1.7 US-based company