Your organization’s name and/or logo goes at the top of the title page.

**REQUEST FOR PROPOSAL (RFP)**

Membership Management Software for Labor Unions

**RFP Release Date: XX/XX/20XX**

[Organization Contact Name]­­

[Address]

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1. Introduction

## 1.1 Overview

Provide an overview of your organization and how it functions. Please include any of the following items you deem important: organization background, history, mission statement, important financial data, and key statistics. Feel free to organize this information in the best way you see fit.

## 1.2 Objective

Provide a description of the purpose of this RFP and a high-level overview of the project you are planning. Be sure to include any major goals you plan to accomplish with sending out the RFP, and subsequently implementing a new membership management software system.

## 1.3 Project Timeline

|  |  |  |
| --- | --- | --- |
| **Key Items** | **Timeline** | **Example Completion Dates** |
| RFP release date | Same date listed on title page | 6/1/2022 |
| Deadline to submit questions (optional) | 2-3 weeks after RFP release date | 6/15/2022 |
| RFP response deadline | 4 weeks after RFP release date | 6/30/2022 |
| Proposal review and initial vendor elimination | 1 month after all responses are collected | 7/1/2022 – 7/31/2022 |
| Vendor presentations and demos | 1 week after initial vendor selection | 8/1/2022 – 8/8/2022 |
| Final vendor selection and notification | 2-4 weeks after demos | 8/26/2022 |
| Contract negotiation and finalization | May take up to 4 weeks after vendor selection | 9/16/2022 |
| Begin implementation process | Following contraction finalization | 10/1/2022 |
| Desired project completion | May be more flexible | 7/1/2023 |

Provide specific dates and deadlines for accomplishing major tasks revolving around your RFP and the overall decision-making process for selecting a new membership management software system. For example, see the chart below:

Include disclaimer: \**Timeline is subject to change*

2. Selection Process

## 2.1 General Vendor Requirements

Use this section to describe the information that you want to see from vendors in their response (RFP response/proposal). You might ask vendors to include the following items:

* Company overview, background, and history
* Information about their implementation process, including data conversion
* Overview of system capabilities including specific application/module functionality and descriptions
* References
* Security and monitoring information
* Third-party integration capabilities
* Ability to make configurations and modifications to out-of-the-box functionality
* Information about post-production and support follow-up
* Information about training and how your users will learn the new system
* Timeline expectations

This section can be formal or informal. You may want to stipulate that the vendor follow the exact layout that you put forth when creating their proposal or you can simply provide a bulleted list, as exhibited above, and let the vendor prepare the information at their discretion.

## 2.2 Requirements Matrix

If you decide to include a Requirements Matrix for vendors to complete (which is supplied as a supplement to this RFP document), here is where you can provide instructions on how to fill it out. It is the responsibility of each vendor to complete this document to describe how they’re able to fulfill the requirements detailed by your organization.

## 2.3 Pricing

In addition to completing the Requirements Matrix, vendors are also responsible for providing a price quote/estimate to your organization that includes all relevant licensing, services, and maintenance costs associated with meeting the scope defined in the communicated requirements. If any additional details are captured due to future discussions, design sessions, or demos, note that the pricing may require revision at a later date.

## 2.4 Questions

Here you would indicate the chance for vendors to submit any questions related to the RFP within the timeframe stated in section 1.3. Also, specify whether or not your organization plans to share all submitted vendor questions in a public forum so that all vendors are privy to the same information. Include the appropriate point of contact for such inquiries in the following format:

**Name**

**Title/Organization**

**Contact Info**

## 2.5 RFP Response Delivery

Indicate here when the completed RFP response (proposal), Requirements Matrix, and associated pricing is due back to your organization (this should reflect the same date listed above in section 1.3). For example, “Please submit electronic copies of all required deliverables to:

**Name**

**Title/Organization**

**Contact Info”**

If you’d prefer to receive hardcopies of vendors’ responses, note that in this section, along with the appropriate mailing information.

## 2.6 Criteria for Selection

Here is where you’ll list your selection criteria, or the criteria you will use to eliminate vendors to ultimately select one final vendor. Below are a few examples your organization may want to use in its decision-making process:

* Response to the RFP document and Requirements Matrix and the extent to which vendors can meet your organization’s requirements
* Submitted vendor pricing estimate
* Software’s demonstrated ease of use
* Software’s demonstrated flexibility
* Software’s API and ability to integrate with third-party systems
* Availability of development tools within the software to allow developers and “power users” to manage changes to the system.
* Availability and quality of training, support, maintenance, and documentation
* Vendor references

## 2.7 Confidentiality & Cost of Proposal Preparation

Please provide a general statement about the confidentiality and exclusivity of this document and its inclusions. Here is an example:

*“All information provided within this document and all related attachments are to be considered confidential and proprietary. Accordingly, sharing this RFP and related documents with any third-party or individual within vendor organizations who is not directly responsible for assisting in the creation of a response is explicitly prohibited.*

***X organization*** *will not be responsible for any cost associated with the vendor’s RFP proposal or associated meetings/demonstrations. Furthermore, we reserve the right to withdraw this RFP or reject vendor submissions for any reason.**”*

3. Current Technology

## 3.1 Existing Membership Management System

Use this section to describe your current membership management software (or customer relationship management software) or collection of systems you use to manage your current membership management related activities and business processes.

## 3.2 Other Existing IT Systems

Use this section to provide vendors with information about any other applications or modules your organization is currently using, especially those that will require integrations with the new membership management software.

## 3.3 Existing Websites

Provide vendors with information on all websites used by your organization, as well as any e-commerce functionality your website(s) supports. Let vendors know who hosts and manages your website(s), and whether or not you’re open to allowing your chosen software vendor to manage these site(s).

## 3.4 Infrastructure

Provide vendors with an overview of the IT infrastructure currently in place at the organization. If your current system is either run “in-house” or hosted by a third-party, denote how users are connecting to the system and the hardware they’re using to connect. If you can, be descriptive in explaining how the network looks at your organization and provide network infrastructure diagrams to visually show vendors the setup of your hardware. Additionally, information regarding the size and experience of your IT staff is valuable to vendors because it affects the implementation project and timeline.

4. Current Business Processes

In this section, give a high-level overview of your current business processes for each functional area/department of your organization. Feel free to add or omit any areas below as they apply to your organization. A good rule of thumb is to capture requirements desired in a new membership management software system, at the same time that you document current business processes for each functional area/department; this will help you organize your Requirements Matrix (should you choose to create one), at a later stage.

## 4.1 CRM

Provide a high-level overview of how your organization uses CRM capabilities and any related information that will be helpful to vendors responding to the RFP.

## 4.2 Membership

Provide a high-level overview of your organization’s membership process, including types of membership and their related length, as well as renewal practices.

## 4.3 Meetings & Events

Provide a high-level overview of the meetings and events that your labor union organizes each year, and of how you typically prepare for them.

## 4.4 Education & Learning Management System

Provide a high-level overview of any education certifications that your organization may need to track or maintain, and/or of any courses for which your organization is responsible to provide.

## 4.5 Products & Inventory Management

Provide a high-level overview of any products that your organization sells or provides for free, both tangible (i.e., a book) and non-tangible (i.e., a downloadable e-book). Make vendors aware of any relationship you might have with a warehouse and its services.

## 4.6 Accounting & Finance

Provide a high-level overview of your organization’s accounting and finance practices and any related information that will be helpful to vendors responding to the RFP.

## 4.7 Marketing & Advertising

Provide a high-level overview of your organization’s marketing and advertising practices and any related information that will be helpful to vendors responding to the RFP.

## 4.8 Chapters

Provide a high-level overview of any chapters that may be affiliated with your organization and how they function in relation to your organization. Note whether or not those chapters will need access to the new membership management software.

## 4.9 Committees

Provide a high-level overview of any committees that your organization runs, including types of members (volunteers, non-members, etc.), and information regarding term and meeting setup.

## 4.11 e-Commerce

Provide a high-level overview of your organization’s e-commerce functionality and any related information that will be helpful to vendors responding to the RFP.

## 4.12 Publications

Provide a high-level overview of any publications that your organization produces and publishes and/or sends to constituents.

## 4.13 Other

Provide a high-level overview of any other business processes your organization has in place and any related information that will be helpful to vendors responding to the RFP.

5. System Requirements Matrix

We recommend that you provide vendors with a detailed list of requirements that you want your new membership management software to fulfill. This is where it is generally expected that you are very specific and granular regarding what you want to see in a new system.   
  
Please feel free to use the attached sample Requirements Matrix as a starting point to supply to your vendors.