REQUEST FOR PROPOSALS:

ASSOCIATION MANAGEMENT SYSTEM

JULY 21, 2021

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Introduction

The Vocational Rehabilitation Association of Canada (VRA Canada) has been the voice representing vocational rehabilitation professionals across Canada for 50 years and counting. VRA Canada has represented and advocated for VR professionals from coast to coast. Our members focus on supporting people experiencing vocational challenges to overcome barriers and achieve their personal goals.

VRA Canada members maintain the highest standards of practice through ongoing education and training. Our association provides unique online learning opportunities for VR professionals, certified continuing education materials and occasions to network with other VR professionals across Canada.

VRA Canada and the multi-disciplinary vocational rehabilitation professionals it represents are committed to supporting, assisting, and advocating for individuals experiencing, or at risk of experiencing, disabling conditions along the continuum of achieving or restoring optimum vocational and life goals. These outcomes are achieved through purposeful and intentional development of strategies and interventions that are informed and directed by education, research, experience and skills, as well as ongoing professional development, unique to the discipline and profession of vocational rehabilitation.

Vision:
To lead the vocational rehabilitation profession in supporting persons experiencing vocational challenges to achieve their unique and individual goals.

Mission:
VRA Canada supports vocational rehabilitation professionals and the advancement of the profession through education, communication, advocacy, and networking.

Membership Size and Structure:
VRA Canada is made up of 1065 members. 80% of the membership are professional members, 15% of the membership is associate members and the remaining 5% of the membership are retired, student and fellow members. Membership renewal typically begins in November and covers the calendar year. Members that renew prior to December 31 are offered an early bird rate. Members can renew up to the end of February then incur a renewal penalty after February 28. New memberships that occur after April 30 are pro-rated for the remaining months of the calendar year.

VRA Canada's membership structure is outlined below:

Professional Members – those Members who hold the designation of Fellow, RRP, RVP, RCSS, MCVP, CVP, CCRC, CRC, CVE, CCVE, or another designation approved by the Board from time to time.	*$325 Early Bird* *$375 Regular*
Associate Members – those Members who are gaining work or educational experience to qualify for their Professional Member status or those Members who have joined the Association to access networking or educational opportunities.	*$275 Early Bird* *$325 Regular*
Retired Friends – those Friends who have retired from the profession but who want to remain in touch and retain their professional status.	*$137.50 Early Bird* *$187.50 Regular*
Student Friends – those Friends who are students in post-secondary education studies in a field related to the Association, as determined through a policy of the Board	*$35*

Member Benefits:
VRA Canada...
- Is dedicated to listening to, supporting, educating, insuring, and advocating for its members
- Provides and maintains professional designations
- Provides Continuing Education Units (CEUs)
- Maintains a professional Code of Ethics
- Promotes VR professionals and field of practice to such stakeholders as employers, unions, insurers, students, educators, government bodies, and workers themselves
- Works closely with the College of Vocational Rehabilitation Professionals (CVRP) to streamline CEU approvals
- Works closely with the Vocational Evaluation and Career Assessment Professionals Association (VECAP) to secure reciprocal memberships, with all the associated benefits
- Is a delegate in the Pan-Canadian Harnessing Talent Alliance
- Is a Member in the Commonwealth Consortium of Vocational Rehabilitation Associations

CONNECT.
- Networking and training opportunities – in-person and online through the VRA ZoomRoom
- An annual conference (in-person and online); meet vendors and other members from across Canada
- Online VRA ZoomRoom sessions including Voices VRoom Cafe – both formal (CEUs) and informal chats
- A dedicated Slack platform with like-minded colleagues on issue-specific channels
- MentorConnect – connect with a mentor for either a one-time conversation or on-going discussions
- Volunteer to join a committee, or take part in an ad hoc group or join your society board – benefits include:
  - earn up to 10 CEUs a year for getting involved
  - connect with colleagues
  - learn more about the profession, and
  - share your time and expertise to support your fellow members.

LEARN.

- Access to the most current research, information, and training with the VRA Online Learning Academy (OLA)
- Exceptional preparation material for exams leading to such designations as the Certified Vocational Rehabilitation Professional (CVRP) and the Return- To-Work Disability Manager (RTWDM) – the study guide for CVRP will be available in French later in Spring 2021
- Member discounts and bulk discounts apply to the OLA modules; CEU's apply
- Free VRA Voices Training Webinars
- Free access to the webinars, resource centre, research and publications offered by the Work Wellness Institute (WWi). CEUs will be applied upon completion of approved webinars
- Continuing Education Units (CEU's) to support professional designations and certifications

SHARE.

- Job opportunities listed on a VRA Job Board
- Regular VRA E-Bulletins; current research and activities in the VR Profession and the Association
- Focus Groups dedicated to student and young members' particular interests and needs
- A VRA Timeline detailing the events and lessons learned over the past 50 years (and counting)
- Regular Onboarding Sessions to meet other members, share experiences, and learn more about the Association and member benefits.

HOT DEALS.

- Preferred member-rate professional liability insurance, as well as discounted home, auto and travel insurance through ProLink
- Perkopolis -- an affinity program, with hundreds of perks in the categories of Shop, Tickets, and Travel.

Statement of Need

The Vocational Rehabilitation Association of Canada seeks a proposal for an association management system (AMS).

What VRA Canada Currently Has:

VRA Canada recently launched a new public facing website in March 2021. It was designed in Webflow. Currently, members must click on a login page to access the membership management system that was designed over 6 years ago. The new public-facing website has a totally different look and feel, it is the first look at VRA Canada that new members get when they attempt to apply for a membership. However, when potential new members or current members click through to apply or access their member profile, they encounter an experience that is visually different. The system also has a tendency to lag, pages are out-of-date and it is not intuitive for staff to create or update pages and add information for members in a timely manner.

Concerns/Issues with the Current Membership Management System:

- Inability to change forms quickly and easily without incurring cost from the IT department and going through a process of quote, confirmation and then waiting for the changes/updates to happen.
- Manual entry of CEUs and the need to search a page at a time for over 15 pages of 1000 CEUs to locate CEU ID
- Members' ability to self-manage their records
- Inability to poll or survey members
- Inability to manage events or connect to or integrate apps that can manage events
- Can only pull limited membership reports with no statistical data
- Have to consult 3 different pages to renew a designation
- A large volume of information within the site has caused the system to be impractical
- No ability to download membership certificates
- Receipts not accessible on member profiles
- Time administrators spend on manual processes cuts into ability to better serve members on key issues and concerns
- Inability to search Key Words

Expected Proposal Deliverables

What VRA Canada Requires in an AMS Solution:

The solutions should directly provide or integrate the following capabilities.

- Ability to transfer data from previous AMS and create customizable data storage for extensive member and company data.
  - Administrators can have access to a report function for membership demographics, behavior, and participation
  - Administrators have access to dashboard capability

- Manage individual membership data and group membership data and payments
  - Members automatically receive receipts for any payments made
  - Members can automatically click a link or button if they have forgotten their password and it will send them their login credentials
  - Members can update their personal profile using text box answer fields
  - Administrators have the ability to track and report on certain key data points
  - Administrators have the ability to allow one person of the group to have access to the group profile information and that member be able to pay dues for the entire group online that will reflect in each individual member's profile
  - Administrators have the ability to easily run reports on how many members are a part of group membership and the number of members each group has
  - Administrators have the ability to run reports on dropped and lapsed members easily and be able to convert to an excel spreadsheet
  - Administrators can easily run renewal reports

- Administrators can automatically remind members when they login to their profile of when their membership is going to expire – automatically at 60 days, 30 days, etc.
- Administrators have the ability to generate past-due notices and keep a history of when they are sent
- Administrators have the ability to update records of all individuals who are part of a group profile by updating the group profile
- Administrators have the ability to password protect the individual member directory on website and have the member control for their own personalized listing
- Administrators have the capability of tracking member status of new, renewed, lapsed or rejoined

- Webinar registration to verify member and nonmember pricing
  - Administrators have the ability to edit what is required when registering for a webinar
  - Administrators have the ability to customize each webinar description and title
  - Administrators have the ability to automatically send a confirmation message or email with a calendar download for the webinar that will populate the appropriate time zone to members
  - Have the capability to automatically send a receipt for webinar purchases to members
  - Administrators can set up and allow coupon discount codes for webinar purchases
  - Administrators have the ability to run revenue reports for event items
  - Mass communication to registrants without being caught in spam filters

- Event Management
  - Administrators have the ability to track our annual conference booth draw, exhibitor points, sponsorship money, floor plans, etc.
  - Members have the ability to register for annual conference
  - Memberships can make payments for the annual conference
  - Members automatically receive receipts for any payments made

- Easily accessible AMS
  - Members have one login (their login for the website) to access even third party web addresses
  - Administrators have the ability to edit every webpage on a moment's notice and be user friendly
  - Administrators have the ability to have a revert/undo option when updating a webpage
  - Administrators have the ability to have a preview option before making the webpage "go live"

- Email function to send members, prospects, and exhibitors and track multiple group lists
  - Administrators have the ability to track segmented marketing communications whether it be via phone, email, etc. and allow for a follow-up reminder of when to contact them
  - Administrators have the ability to easily send segmented marketing communications
  - Administrators have the ability to create a Peer Finder function where members can locate other members and send them an email based on geographic location, company size, etc.

- CEU Management
    - Members have the ability to upload, manage and view CEUs
    - Administrators can automatically remind members in advance of deadline when their Designations are going to expire – automatically at 60 days, 30 days, etc.
    - Maintain a list of CEU approved course to choose from
    ** In the process of reviewing and revising the CEU tracking and process – potentially developing an honor system for tracking and random auditing process

- Professional Designation Program
    - Members have the ability to upload designation applications
    - Administrators can approve designation applications and a certificate is automatically created and emailed to the member
    - Administrators can deny the designation applications with an area to provide comments on achieving the designation approval

- Create a "water cooler" meeting space for members to network -- a message board and forum for discussion by topic
- Build out a job board that members can access at any time
- Easy access to benefits and perks websites
- Updated list of content to access – articles
- One-stop shop for downloads of documents, forms

Guiding Principles
Through new systems, we want to apply the following principles:
- **INTEGRATE -** Reduce number of systems, find tools that integrate with each other
- **AUTOMATE -** Offer smart workflows to replace manual processes
- **ENLIGHTEN -** Improve reporting and business intelligence for better organizational management
- **SIMPLIFY -** Ensure tools/systems are user friendly and intuitive for users
- **SECURE -** Use encryption and strict user-based control to meet government privacy legislation

Core Criteria
Before preparing and submitting a proposal, please ensure you meet these core requirements.
1. **No Custom Web Applications**

   Solutions should be off the shelf products that are configured to meet our needs. We will not be custom developing a solution to meet our requirements.
2. **Software as a Service (SaaS) Solution**

   We should not be directly managing the underlying servers, storage, or licensing.
3. **Integration Capability**

   Ability to sync through APIs such as (but not limited to) Mailchimp, or Survey Monkey or Slack or PayPal.

4. **Can Integrate Easily with Webflow Website www.vracanada.com**

   We require a solution that can seamlessly allow members to move between the public website and the new AMS.

5. **Bilingual Solution(s)**

   The AMS must be scalable to eventually serve association members in both English and French.

6. **Three References Required**

   We will require three references for work completed within the last 2 years, for associations of similar size.

Selection Criteria

Proposal 40%:
• Clear descriptions of the work to be accomplished to include objectives, goals and action steps.
• Expected outcomes
• Recommendations of responsible group/persons for the work
• Schedule of work/timeline.

Demonstrated Capacity to do the Work 30%:
• Appropriate and relevant knowledge, skills, and experience
• Previous experience with healthcare associations or small associations
• Consensus building
• Creative approach for custom items.

Cost 30%:
• A thorough and feasible outline for costs including expected and maximum number of hours to cover costs, and any other costs associated.
• Clear outline of licensing fees and any ongoing maintenance costs.

How to Respond

We anticipate proposals from suppliers of Association Management Systems. Please be prepared to provide an online demonstration of your product.

Please verify that you meet the core criteria and for each requirement, provide the following:
   a. Proposals should be in English.
   b. Note your ability to provide the desired functionality with comments as needed
   c. For functions that might be provided by a point solution (e.g. a separate Event Management platform), please specify if you have a recommended solution and describe any integration capability your database provides.

Timing

Milestone:	Deadline:
RFP posted	Wednesday, July 21, 2021
Confirmation of intent to bid	Monday, August 2, 2021
Questions	Friday, August 13, 2021 @ 2 PM ET
Response to questions (sent to all registered bidders)	Friday, August 13, 2021 @ 2 PM ET
Deadline for proposals	Friday, September, 3, 2021 @ 2 PM ET
Committee to review proposals	September 6 – 10, 2021
Presentations (if required) from final candidates	September 13 – 15, 2021
Contract awarded	September 24, 2021
Project start date	October 1, 2021

Submission Deadline and Contact Information

Please submit your confirmation of intent to bid via email for Monday, August 2, 2021.

Please submit your question via email to arrive no later than 2:00 p.m. ET, Friday, August 13, 2021.

Please submit your proposal via email to arrive no later than 2:00 p.m. ET, Friday, September 3, 2021.

Email as PDF File to:

VRA Canada National Office
Alicia Forgie
e: info@vracanada.com
c: 613-312-7452

Email subject: **Proposal – VRA Canada AMS –** *Your Product or Company Name*