

Bergen County Chamber of Commerce

REQUEST FOR PROPOSAL (RFP)

Website Member Management Upgrade

MEMBERSHIP MANAGEMENT SYSTEM REPLACEMENT

Bergen County Chamber of Commerce
189 N. Franklin Tpk.
Ramsey, New Jersey 07446
Phone: 888-598-2507
membership@bergencountychamber.com

RFPID: 2

Prepared By: Bergen County Chamber Of Commerce

Date: November 21, 2024

REQUEST FOR PROPOSAL
Website Member Management Upgrade
Ramsey, New Jersey

RFPID: 002

QUESTION SUBMISSION DEADLINE: December 2nd, 2024

PROPOSAL SUBMISSION DEADLINE: December 10th, 2024

Questions may be submitted in written form to:

Contact Name: **Joseph Vanacore III**
Email: Joe.v@vitalcorefs.com
Phone: (201) 458-2146

INTRODUCTION

The Bergen County Chamber of Commerce (BCCC) invites and welcomes proposals for a Website Member Management Upgrade project. Based on your previous work experience, your firm has been selected to receive this RFP and is invited to submit a proposal. Please carefully read and review the proposal requirements. All proposals must be submitted by the timeline specified above under the "PROPOSAL SUBMISSION DEADLINE."

Bidders should note that any work intended to be subcontracted must be accompanied by background materials and references for proposed subcontractor(s) – NO EXCEPTIONS.

PROJECT AND LOCATION

The project associated with this RFP shall be located at:
189 N. Franklin Tpk., Ramsey, New Jersey 07446.

PROJECT MANAGER CONTACT INFORMATION

For questions or information regarding this project, contact:

Name: Joe Vanacore
Title: Board Member
Phone: (201) 458-2146
Email: Joe.v@vitalcorefs.com

PROJECT OBJECTIVE

The objective of this project is to upgrade BCCC's existing membership management system to provide enhanced automation, flexible payment options, customized membership levels, and improved self-management tools for members.

PROJECT SCOPE AND SPECIFICATIONS

The scope of this project includes upgrading and enhancing the website member management system with the following key features:

Automated Billing and Subscription Management

- **Annual Billing Automation:** System must support automatic billing for annual membership subscriptions, with the ability to renew memberships automatically and send out reminders or confirmations of renewals.
- **Flexible Payment Options:** Provide multiple payment methods, including credit card, ACH, and PayPal, with options for members to store payment information securely.
- **Subscription Flexibility:** Ability to handle one-time fees, annual or monthly billing cycles, and discounts for early renewals or multi-year commitments.
- **Overdue Payment Handling:** Automated reminders for overdue payments, with follow-up actions such as restricted member access or suspension if payments are not completed.

Membership Levels and Pricing Tiers

- **Custom Membership Levels:** Define and manage multiple membership levels with variable subscription costs, benefits, and access permissions.
- **Level-Based Content and Benefits Access:** Define restricted access to specific content, events, or resources based on membership level.
- **Customizable Onboarding for New Members:** Automated onboarding emails, instructions, and materials that vary by membership level.

Member Login and Self-Management Portal

- **Member Dashboard:** Create a member dashboard where users can view their membership status, billing history, and update their personal or business information.
- **Editable Member Profile Fields:** Allow members to update contact information, job title, company website, and other relevant information.
- **Order Invoices and Receipts:** Provide easy access to invoice order receipts for expense tracking.

Communication and Engagement Tools

- **Automated Email Notifications:** Notifications for key actions such as upcoming renewals, overdue payments, new member resources, or event announcements.
- **Newsletter and Announcements Integration:** Connect to an email marketing service or have a built-in option to send targeted announcements or newsletters.

Reporting and Analytics

- **Membership Reports:** Generate reports on active memberships by level, payment history, and renewals.

Technical and Security Requirements

- **Mobile Optimization:** Ensure the system is fully responsive and user-friendly on both desktop and mobile devices.
- **Data Export:** Capability to export member data for offline storage or CRM integration.
- **Data Migration:** Vendor must migrate existing user data from WildApricot to the new member management platform.
- **Visual Composer:** Wordpress visual composer capability or ability to integrate with common Wordpress visual composers.
- **User Password Reset:** Ability for user to reset password
- **Admin Password Reset:** Ability for admins to reset passwords or send password reset links
- **Login Security:** Lockout users after a defined number of login attempts to prevent brute force attacks

Support and Training

- **Technical Support:** Offer support options, especially during setup and onboarding, offer ongoing support as needed.
- **Training and Documentation:** Provide video tutorials, user guides, and live training sessions to facilitate ease of use for chamber administrators and members.

Integration and Extensibility

- **API Access:** for integration with CRM, accounting, and marketing automation tools.
- **Compatibility:** Ensure compatibility with Wordpress and other options such as WooCommerce, MailChimp, Constant Contact, PayPal, Stripe, Authorize.net, etc to extend system functionality.

SCHEDULED TIMELINE

The following timeline has been established to ensure that the project objective is achieved, subject to necessary changes:

Milestone	Date
Proposal Deadline	12/10/2024
Project Start Date	12/17/2024
Estimated Completion Date	01/27/2025

PROPOSAL BIDDING REQUIREMENTS

PROJECT PROPOSAL EXPECTATIONS

Bergen County Chamber Of Commerce will award the contract to the proposal that best accommodates the project requirements. BCCC reserves the right to: (i) award any contract prior to the proposal deadline, (ii) award the contract to more than one Bidder, and (iii) refuse any proposal or contract.

DEADLINE TO SUBMIT PROPOSAL

All proposals must be received by Bergen County Chamber of Commerce no later than **December 10th, 2024**, for consideration.

PROPOSAL SELECTION CRITERIA

Proposals will be evaluated based on:

- Timeliness and format compliance
- Performance effectiveness of proposed solution
- Bidder's history and capability to deliver the services
- Cost-effectiveness

BCCC reserves the right to cancel, suspend, or discontinue any proposal at any time.

PROPOSAL SUBMISSION FORMAT

The following information must be included in the submission:

- **Summary of Bidder Background**
 - Name, address, contact information
 - Legal formation and company details
 - FEIN and business license
 - Track record of similar projects
- **Financial Information**
 - Bankruptcy history or sanctions, if applicable
- **Proposed Outcome**
 - Timeline and scope of work
 - Equipment or services from subcontractors
 - Cost breakdown and summary
- **Licensing and Insurance**
 - Details on licenses and insurance coverage, if applicable
- **References**
 - Two references of similar work completed

By submitting a proposal, Bidder agrees that BCCC may contact references for performance evaluations.