



Washington Council of Agencies
WASHINGTON AREA NONPROFITS WORKING TOGETHER

**Proposal for an Integrated Association Management
System (AMS)**

Presented By:



THIRD SECTOR SYSTEMS, INC.

Do More. Effectively. With Less.

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Washington Council of Agencies Needs:

The Washington Council of Agencies (WCA) is based in Washington D.C. and serves the entire Washington metropolitan region including: the District of Columbia, Suburban Maryland and Northern Virginia. For 25 years, WCA has provided nonprofit organizations with technical assistance, networking, education and training and group buying discounts.

The WCA fills a variety of needs for the nonprofit sector and its member organizations. The WCA works in areas that include:

- Education and training workshops for staff and leaders in nonprofit organizations
- Publications and research documents for nonprofit growth and development
- Advocacy work and public policy initiatives to inform and motivate the nonprofit sector
- Vendor and business networking to find the best matches for nonprofit needs

The WCA needs to develop a comprehensive integrated database and association management system that will allow tracking of all members, prospective members and supporters and staff of those organizations. The system must be flexible, user-friendly and able to accommodate the multiple roles and relationships that many individuals associated with WCA fulfill. The new database must be able to track technical assistance, group buying program use and other member services used.

Third Sector Systems Proposal:

Third Sector Systems proposes that the Washington Council of Agencies use Mission Maestro™, our client based application currently in use at over (???) organizations to:

- Improve WCA's workflow
- Integrate WCA's Membership, Publications, Advertising, and Vendor Databases
- Track All Services Provided to Members
- Integrate Data from Online Registration
- Interface with WCA's Peachtree accounting system

The following table contains the Washington Council of Agencies Association Management System Requirements - and Mission Maestro's ability to meet those requirements.

Mission Maestro's Ability to Meet WCA's Requirements

Requirement Met	WCA Association Management System Requirement
Yes	Member/Prospective Organizations: name, address, phone, fax, executive staff, how long a member of WCA, relationship to WCA, Member benefit programs enrolled – i.e. health, credit union, technical assistance, etc.
Yes	Member Organizations' – Staff and Associated Individuals: name, organization, position, salutation, multiple alternate addresses, phone, fax, email, designations, committee assignments, titles, government contacts, events attended

Requirement Met	WCA Association Management System Requirement
Yes, see below	Member and associate member dues billing - monthly, quarterly, semi-annual and annual and the ability to interface with the Peachtree accounting system in place.
	We currently integrate with QuickBooks. All major accounting integration functionality exists, but we will incur costs to integrate with Peachtree. We will expect you to share those costs which we have written into the budget.
Yes	Unlimited dues classes, ability to bill for multiple types per member
Yes	Invoices for single member, all members or only past-due members
Yes	Current payment entry and payment history
Yes, see below	Single entry address and contact information
	Single entry address and contact information has been requested by other customers and is currently slated for release in Version 4.5.
Yes	Cancel, renew and reinstate memberships
Yes	Multiple-location organizational offices – subsidiary offices relationships, organizational partnerships and mergers
Yes, see below	Ability to query and report from any and/or all fields in database
	All fields are reportable through our integrated Report Writer. Most fields are mergable.
System must have customizable or unlimited:	
Yes	Individuals & organizations - Demographic information
Yes	Marketing codes – types of membership, committees assigned, board member, enrolled in which member plans, wide diversity of codes possible.
Yes	Affiliations or Relationships between professionals and organizational records.
Membership & Mailings	
Yes	Select mailings by member, non-member, district
Yes	Select mailings by individual type, mailing types
Yes	Mailing labels, exports,
Yes	Outlook email integration, letters
Yes	Shipping labels, badges
Yes	Select mailings by member, non-member, district

Requirement Met	WCA Association Management System Requirement
Yes	Ability to combine non-related mailings into one large mailing
Yes	Complete customization for specialized mailings
Yes	Reports for New, Renewing, Lapsed, Members on a Monthly, and Yearly Basis
Yes	Ability to categorize each organization. Example: Member, Media, Friend of WCA, Prospect, Govt, etc.
Technical Assistance	
Yes	Technical Assistance provided to organizations
Yes	Technical Assistance provided to individuals and their relationship to organizations
Yes	Phone and email or form of contact
Yes	Time spent responding to inquiry – beginning time, end time, forward to other WCA staff member, etc
Education and Training	
Yes, see below	Online registration for seminars, workshops, classes and conferences We have partnered with Entango to provide a variety of online tools including online registration to our customers. All information collected by Entango is automatically integrated into Mission Maestro.
Yes	Complete workshop and seminar tracking
Yes	Credit hours tracking for continuing education - by individual and organization
Yes	Tracking of class completions for certification completion
Yes	Complete participation list reports
Yes	Mailing labels, badges
Yes	Sign-in sheets, rosters
Yes	Confirmation letters/e-mails
Yes	Counts of registrants per class
Yes	After-seminar updates includes marking all attendees as attended at one time and updating credit hours earned
Yes, See Below	Evaluation online – analysis and feedback forms Our partner Entango will develop online analysis and feedback forms which will be automatically integrated into Mission Maestro.

Requirement Met	WCA Association Management System Requirement
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Training – Speaker Criteria

Yes	Qualifications and Certification
Yes	Specialties, Areas and Subject of Expertise
Yes	Multiple speakers per class, if required
Yes	Comments and Evaluations
Yes	Fees
Yes	Media Requirements
Yes	Availability and Status

Government Relations & Advocacy

Yes	Maintains Records of Congressional Committee Activities And Positions or equivalent
Yes	Maintains Issue Interest Levels Of Members and Involvement
Yes	Districts (Federal And Local) Updates By Zip Code Page On Membership Records
Yes	Maintain Issue Assignment Reports, Committee Assignment Reports, Label Reports and Links to Membership Reports
Yes	State House, Senate, Congressional and local politicians - District of Columbia, Ward representatives must be able to be listed and tracked in this section.
Yes	Individual voting districts and organization district locations
Yes	Tracking of staff or organizational members who know legislators personally
Yes	Reports of specific legislative and related voting district-based individuals
Yes	Legislator maintenance including address, phone fax, email, party, committees, and multiple addresses info etc.
Yes	Merge letters and emails to politician by type and district
Yes	Email integration for communication to members within districts
Entango??	Web integration: Online action alerts and methods of action for members – tracking those methods and results

WCA Committees and Boards

Yes	Maintain unlimited number of committees quickly
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Requirement Met	WCA Association Management System Requirement
Yes	Track persons serving on multiple committees or boards
Yes	Create mailings, basic & detailed rosters
Yes, see below	Rosters listed in order of rank (president, vice pres, past pres), which can be updated
	Rosters may be created by outputting to a file and sorting by rank.
Yes	Email to each committee member of a committee
Yes	Track committee member term dates
Yes	Ability to show all past presidents or chairperson as a roster or mailing
Yes	Ability to mail to all chairpersons at one time
Publications & Advertising	
Yes	Purchase of individual publications
Yes	Organizational history of publications purchased
Yes	Individual record of publication purchased – relationship to organization
Yes	Tracking of advertisements for monthly or quarterly magazines/newsletters
Yes	Issue size, type, pricing, color needs
Yes	Ability to record notes for each ad/issue
Yes	Links to ad media
Yes	Reports of upcoming & past billings, invoices
Yes	Reports of issue assignments for upcoming issues
Yes	Renewal letters, envelopes, labels
Administration	
Yes	Separate administration oversight or permissions to modify settings
Yes	Categories - individual affiliations and organizational relationships can be created, modified and deleted.
Yes	Information of user entries of events by date, time and user available – “last change made by”
Yes	User accounts can be created, modified and deleted.

Requirement Met WCA Association Management System Requirement

Other Options Required:

Yes Search through title and description over a range of dates and by categories or fields available.

Yes, See Below Ability to easily import data from other sources.

Our Data Import Utility allows you to quickly and accurately add information from an external database to your Mission Maestro™ system.

? Less layers to navigate.

Less layers to navigate compared to what?

Option Desired:

Yes Ability to schedule conference rooms rented by 3rd party organizations

Optional Features - Membership Directory

Yes Membership Directories created automatically!

Yes, see below Membership List by Organization Type

Membership Lists by organization type can be generated by the Report Writer, or output to file and sorted

Yes, see below Directory by City, District and County

A Membership Directory by City, District and County can be generated by the Report Writer

Yes Alphabetical Individual List by organization

Yes List of Board of Directors and Committees

Yes List of individuals with specific designations

Mission Maestro

Designed to Integrate Nonprofit Organizations

Mission Maestro is an organization wide software solution designed for nonprofit organizations like the Washington Council of Agencies. Mission Maestro is designed to manage the multiple roles and relationships that individuals affiliated with nonprofit organizations fill.

Mission Maestro integrates all the contact individuals have with the WCA so you can see all contact you have had with an individual - and all the individuals within an organization. Mission Maestro tracks people, events and related activities associated with each organization you have a relationship with. Mission Maestro also tracks your relationship with other nonprofits, businesses, funders and individuals who support your mission.

A System Designed to Grow With You

Mission Maestro is a large, complex system that can be configured to support the WCA's unique processes and services. None of Third Sector Systems' customers use all of Mission Maestro's functionality, but all benefit from the complete integration of their organization's data. Mission Maestro will grow with you as your staff increases and the programs you offer increase. No custom programming is required to add new programs or services. Any member of your staff with permission can "expand" the system to meet their needs as the information you manage grows and changes.

A Mature Product Backed by a Team of Professionals

Mission Maestro has been used to run nonprofit organizations since 1999. Years of use, customer feedback and refinement result in a product that is stable and mature. Mature, but always improving. Our staff of developers constantly works to improve Mission Maestro. We listen to your current needs, anticipate your future needs and improve our software to meet them. Our team of support professionals is always ready to answer your questions. And, when you experience staff turnover, we're there to get your new staff member up and running. We focus on the software so you can focus on your mission.

Implemented Without Expensive Hardware Investment

There are two sets of minimum technical requirements for Mission Maestro, one for the server system and the other for the individual machines operated by your staff members.

For the server, you need:

- a Pentium 4 Processor
- 512 MB of RAM (memory)
- 40 GB of hard drive space
- a Netware, 2000, 2003, or NT operating system

Your staff members will need the following on their machines in order to run Mission Maestro:

- a Pentium 3 processor or higher
- 128 MB of RAM (memory)
- 200 MB of hard drive space
- a Windows 98se, 2000, ME, XP, or NT operating system

Implementing Mission Maestro

The implementation of Mission Maestro includes the full convergence of data from your existing databases as well as staff training and software installation. A sample WCA Project Plan detailing all the steps required for successful implementation is included as an attachment to this proposal.

Timeline

WCA has identified a very aggressive timeline which will be challenging to achieve, even with an established system like Mission Maestro. The availability of WCA staff to do preparation for the Implementation Review, the Data Mapping and Data Verification and Staff Training will be the primary factor in achieving the target implementation date of mid-September 2004. In our experience many

staff take vacations in the summer, especially in August, which makes scheduling activities that require the participate of all staff very difficult if not impossible.

Implementation Process

The implementation process requires strong communication and adherence to dates within the implementation team, particularly between WCA's Project Lead and TSS's Project Coordinator. When a task date is compromised, the entire project is affected. The Project Coordinator at Third Sector Systems' will closely monitor the delivery and milestone dates during the implementation process. Status reports, which will be prepared on a regular basis, will be sent to the Project Lead at the organization. Meetings, which will include members of the implementation team from both organizations, will be held as needed to discuss progress and any changes to the schedule.

Data Convergence

Data Convergence is the process by which we take the Washington Council of Agencies' current data from the multiple databases it resides in now and transfer it into Mission Maestro. During Data Convergence we will clean and standardize the data. Data Convergence is an opportunity to remove unneeded information and group items into new categories as necessary.

Training

Third Sector Systems will develop a training course to fit the needs of the Washington Council of Agencies. All courses will be delivered using distance learning technology or onsite. Distance learning saves the state time and money. Users will not be required to travel or reserve large blocks of their time for training because they will learn how to use the software from their own desks during 2 or 3-hour sessions.

Onsite training classes are similar in length depending on the subject matter, but due to the large block of times required and travel onsite training. There are additional costs involved to cover transportation, lodging and food. Third Sector Systems will be responsible for scheduling all training.

Support

Our industry standard support will provide users with answers to the Washington Council of Agencies' use questions through web chat. With web chat, no one will spend time waiting on hold for answers. Our support professionals are instantly available Monday through Friday from 8:30 am to 5:00 p.m. EST. If we are unable to answer questions via web chat we will provide that service on the phone or with a web conference.

Price Quote

Client References

Include comparable projects and a one sentence description of client's situation/project

Attachments

Washington Council of Agencies Sample Project Plan
Mission Maestro Implementation w/Data Convergence