

## **REQUEST FOR PROPOSAL**

**RFP Release Date:** April 24, 2018

**Deadline for Questions:** May 4, 2018

**Proposal Submission Deadline:** May 18, 2018

**Anticipated Award Date:** June 1, 2018

**Subject: ICMAHO/NetFORUM Upgrade Support/2018**

The International City/County Management Association (ICMA) is seeking proposals from eligible Respondents for professional services for ICMA in Washington, D.C. ICMA may award multiple awards as a result of this solicitation.

Technical questions concerning this solicitation should be directed to Monica Jordan, [mjordan@icma.org](mailto:mjordan@icma.org). All contractual questions relating to this solicitation must be submitted to Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org).

All communications must include the solicitation title, **ICMAHO/NetFORUM Upgrade Support/2018**, in the subject line.

No communication intended to influence this procurement is permitted except by contacting the designated contacts above. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

This solicitation in no way obligates ICMA to award a contract nor does it commit ICMA to pay any cost incurred in the preparation and submission of a proposal.

ICMA bears no responsibility for data errors resulting from transmission or conversion processes.

ICMA appreciates your responsiveness and look forward to a mutually beneficial business relationship.

Sincerely,

Monica Jordan, AMS Senior Manager

A decorative graphic in the bottom right corner of the page, consisting of several overlapping, semi-transparent squares of varying shades of light blue and grey, arranged in a stepped, staircase-like pattern.

## **PURPOSE**

ICMA seeks a contractor with a minimum of 5 years' experience in performing upgrades in the netFORUM Enterprise application. The priority for this solicitation is the ICMA upgrade from the netFORUM 2013 application to the netFORUM 2017 application and on-going emergency maintenance related to the upgrade. In addition, ICMA is seeking assistance with assessment of applicability of other modules not currently being used; as outlined in this solicitation.

## **ABOUT ICMA**

ICMA advances professional local government worldwide. Our mission is to create excellence in local governance by developing and fostering professional management to build sustainable communities that improve people's lives worldwide. ICMA provides member support; publications; data and information; peer and results-oriented assistance; and training and professional development to more than 10,000 ICMA, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

ICMA is a 501(c)(3) nonprofit organization founded in 1914 that offers a wide range of services to its members and the local government community. The organization is an internationally recognized publisher of information resources ranging from textbooks and survey data to topical newsletters and e-publications. ICMA provides technical assistance to local governments in developing and decentralizing countries, helping them to develop professional practices and ethical, transparent governments. The organization performs a wide range of mission-driven grant and contract-funded work both in the U.S. and internationally, which is supported by federal government agencies, foundations, and corporations.

ICMA provides technical and management assistance, training, online services, and publications to managers around the world. The management decisions made by ICMA's members affect more than 100 million individuals in thousands of communities—from small towns with populations of a few hundred to metropolitan areas serving several million.

ICMA is the only national organization that focuses on the needs of appointed local government managers. For more information regarding ICMA's programs and services, please go to [www.icma.org](http://www.icma.org).

ICMA's Dun and Bradstreet number is 072631831.

## **SCOPE OF WORK**

### **BACKGROUND**

NetFORUM 2013 was implemented in February 2015. ICMA is seeking a full-service provider to provide an assessment and full support for upgrading to a newer version of NetFORUM i.e. NF2017.

### **DELIVERABLES**

Specific tasks necessary for the netFORUM Enterprise upgrade include the following (and the vendor should suggest additional tasks that allow for a timely and successful migration):

#### **Important Modules:**

The following modules need to be evaluated for Best Business practices/process review and all customizations (iWeb and eWeb) related to these modules also need to be accounted for and fully functioning in NF2017 to guarantee a successful upgrade:

- ✓ Accounting
- ✓ Awards
- ✓ Certification
- ✓ CMS
- ✓ Committee
- ✓ CRM
- ✓ Events
- ✓ Fundraising
- ✓ Inventory
- ✓ Marketing
- ✓ Membership
- ✓ Subscriptions

#### **Test Environment:**

- ✓ Installation of netFORUM 2017 in Test2, Test3 and Dev Environments along with documentation from the netFORUM 2013 install
- ✓ Develop database migration scripts and perform migration activities – preserving all existing iWeb customizations
- ✓ Review existing iWeb customizations and compare with netFORUM 2017 baseline forms to determine functionality that ICMA may be missing.
  - ✓ Evaluate and propose alternative payment gateway that is supported by netFORUM  
(Vantive, Sage, etc)
- ✓ Develop and Implement a plan to ensure that testing of the Informz integration can be completed prior to production implementation.
- ✓ Vendor would be responsible for compiling custom code and DLLs. Vendor would be responsible for the testing of all xweb calls that interfaces with netFORUM

- ✓ Develop test plan based on the netFORUM 2017 implementation – which includes the following ICMA customizations:
  - ✓ Standard Operating Procedures need to be created and/or updated based on the netFORUM 2017 implementation – which includes the ICMA customizations
  - ✓ As part of the development of Test Plans and Standard Operating Procedures the selected vendor should use their expertise in offering operating efficiencies that would allow ICMA to use baseline NF 2017 vs. the customizations currently used by ICMA
  - ✓ Work with ICMA staff to conduct testing, logging errors for resolution, resolve errors, etc.

**Production Environment:**

- ✓ Production deployment based on migration scripts used for netFORUM 2017 test environment would be deployed by Abila (ICMA is a hosted customer.) However, the vendor would be available to assist as needed at the time of all deployments.
- ✓ 12 Months of follow-up support to include ongoing emergency maintenance related to the upgrade will be needed to address any migration issues identified by ICMA.
- ✓ Project Planning –Host will provide an initial project plan

The vendor chosen for support must also incorporate a detailed project plan that will include (but not limited to) a plan that includes all ICMA customizations and eweb Pages for conversion. Vendor is expected to update the project plan regularly and provide updates for each status meeting.

**SUBMISSION REQUIREMENTS**

Section 1. Company profile:	Provide a description of your business <ol style="list-style-type: none"> <li>1. Provide the year established in the current business for the services requested in this request for proposal.</li> <li>2. Please provide a copy of your annual report and include information on company size, number of employees and annual revenue.</li> <li>3. Resumes and background information of key personnel- in a leading paragraph, please indicate the individuals who would be assigned for this endeavor, their qualifications for the job and their role(s) on this project. Please indicate which of your key personnel will perform the role of a project manager.</li> </ol>
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Section 2: References:	A description of the types and sizes of client organizations served, as well as a sample client list indicating the type of services rendered. Respondents should provide references as follows: <ol style="list-style-type: none"> <li>1. At least three (3) clients who the vendor has upgraded to v2017 (or v2015 is acceptable).</li> <li>2. The contact information should include the contact name, phone number, e-mail address, and website address. References will be contacted as part of the evaluation process.</li> </ol>
Section 3. Approach:	<ol style="list-style-type: none"> <li>1. Describe how your company provided similar support services for a client.</li> <li>2. What does your company anticipate as challenges?</li> <li>3. How does your company manage timelines?</li> <li>4. Provide a suggested timeline with key milestones and tasks.</li> </ol>
Section 4. NF Expertise	<ol style="list-style-type: none"> <li>1. Define which modules your company has successfully implemented customizations for? Give examples of your best improvements.</li> <li>2. What is your recommendation for converting eWeb pages – what is your approach?</li> <li>3. How are tasks distributed among your team?</li> </ol>
Section 5 Pricing	<ol style="list-style-type: none"> <li>1. Respondents should choose an hourly rate and the estimated Level of Effort (LOE) for each task as found in the pricing template provided on the following page.</li> </ol> <p>Please be advised that ICMA is cost-conscious about procuring outside services.</p>

## PRICING INSTRUCTIONS

The following Pricing Template details modules to be evaluated for Best Business practices/process review. All customizations (iWeb and eWeb) related to these modules shall be accounted for and fully functioning in NF2017 to guarantee a successful upgrade. Each module is to be priced separately.

## PRICING TEMPLATE

Important Modules		
Task	Hourly Rate	Estimated LOE
▪ Accounting		
▪ Awards		
▪ Certification		
▪ CMS		
▪ Committee		
▪ CRM		
▪ Events		
▪ Fundraising		
▪ Inventory		
▪ Marketing		
▪ Membership		
▪ Subscriptions		

Test Environment		
Task	Hourly Rate	Estimated LOE
Installation of netFORUM 2017 in Test2, Test3 and Dev Environments along with documentation from the netFORUM 2013 install	Provided by Host	N/A
Develop database migration scripts and perform migration activities – preserving all existing customizations	Provided by Host	N/A

Review existing customizations and compare with netFORUM 2017 baseline forms to determine functionality that ICMA may be missing.		
Evaluate and propose alternative payment gateway that is supported by Host (Vantive, Sage, etc)		
Develop and Implement a plan to ensure that testing of the Informz integration can be completed prior to production implementation.		
Vendor would be responsible for compiling custom code and providing associated DLLs. Vendor would be responsible for any xweb calls that interfaces with netFORUM		
Develop test plan based on the netFORUM 2017 implementation – which includes the ICMA customizations		
Standard Operating Procedures need to be created and/or updated based on the netFORUM 2015 implementation – which includes the ICMA customizations		
As part of the development of Test Plans and Standard Operating Procedures the selected vendor should use their expertise in offering operating efficiencies to current ICMA processes to fully utilize the power of the netFORUM application.		
Work with ICMA staff to conduct testing, logging errors for resolution, resolve errors, etc.		

<b>Production Environment</b>		
<b>Task</b>	<b>Hourly Rate</b>	<b>Estimated LOE</b>
Perform production deployment based on migration scripts used for netFORUM 2017 test environment and the multiple dry-runs that would be performed.		
12 Months of follow-up support to include ongoing emergency maintenance related to the upgrade will be needed to address any migration issues identified by ICMA.		
Project Planning – Develop project plan after contract kick-off and update based on regular status meetings with ICMA staff.		

**TYPE OF CONTRACT TO BE AWARDED**

ICMA anticipates issuing the successful Respondent(s) a Master Services Agreement (MSA) to include the terms and conditions under which firm fixed price or hourly-based Statements of Work (SOW) shall be awarded. At the direction of the ICMA Project Manager, Contractor shall write and provide SOW and pricing detailing their suggested approach.

Issuance of a Master Services Agreement shall not be construed to constitute authorization for any work anticipated by this solicitation. Work can only be authorized by issuance of a SOW signed by an authorized ICMA representative. ICMA makes no assertions that SOWs will be issued for all work anticipated by this solicitation.

**CONTRACT TERM AND DELIVERY DATES**

ICMA expects this scope of work to be completed within 6-9 months from project kick-off. Final delivery dates will be negotiated upon award of SOWs.

**EVALUATION AND AWARD PROCESS**

Offers will be evaluated based upon:

1. ability to match the qualifications set forth in this solicitation
  - a. section 1 (20%)
  - b. section 2 (20%)
  - c. section 3 (35%)
2. price (25%)

ICMA reserves the right to award under this solicitation without further negotiations. The respondents are encouraged to offer their best terms and prices with the original submission.



## **INSTRUCTIONS TO THE RESPONDENTS**

Respondents interested in providing the services described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP. Adherence to the proposal format by all respondents will ensure a fair evaluation with regard to the needs of ICMA. Respondents who do not follow the prescribed format may be deemed non-responsive. A letter transmitting the proposal must be signed by an officer of the firm authorized to bind the respondent as required by this solicitation.

1. Transmission letter
2. Submission Requirements Documentation
3. Completed and signed required forms

Packages must be submitted electronically to [mjordan@icma.org](mailto:mjordan@icma.org) with a copy to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org). Place “**ICMAHO/ NetFORUM Upgrade Support/2018**” in the subject line. No phone calls please.

Applications received after the closing date stated on the top of page 1 will be rejected.

## **APPENDICES (REQUIRED FORMS)**

W-9  
New Vendor Form

## **GENERAL CONDITIONS**

Proposal Submission - Late proposals and proposals lacking the appropriate completed forms will be returned. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA location other than the email address above. If changes are made to this solicitation, notifications will be sent to the primary contact provided to ICMA from each Respondent. ICMA takes no responsibility for effective delivery of the electronic document. The vendor offer will be rejected, if the vendor modifies or alters the electronic solicitation documents.

Proprietary Information - Careful consideration should be given before confidential information is submitted to ICMA as part of your proposal. Review should include whether it is critical for evaluating a proposal, and whether general, non-confidential information, may be adequate for review purposes. Information submitted to ICMA that the Respondent wishes to have treated as proprietary and confidential trade secret information should be identified and labeled "Confidential" or "Proprietary" on each page at the time of disclosure. This information should include a written request to exempt it from disclosure, including a written statement of the reasons why the information should be exempted. However, ICMA cannot guarantee the confidentiality of any information submitted.

Contract Award - ICMA may award multiple awards under this solicitation. It may award a contract based on initial applications without discussion, or following limited

discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA may request additional data or material to support applications. ICMA expects to notify Respondents in approximately one month from the proposal due date whether your proposal has been selected to receive an award.

**Limitation** - This solicitation does not commit ICMA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA reserves the right to accept or reject any or all proposals received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in ICMA's best interest.

**Disclosure Requirement** - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States, and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or members of any similarly governing body. If an indictment or conviction should come to the attention of ICMA after the award of a contract, ICMA may exercise its stop-work right pending further investigation, or terminate the agreement.

**No Gifts** - It is ICMA's Policy that no gifts of any kind and of any value be exchanged between respondents and ICMA personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any ICMA's procurements and may result in disciplinary actions against ICMA personnel involved in such discovered transactions.

**Equal Opportunity** - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

**Small and Disadvantaged Businesses** - ICMA shall use good faith efforts to provide contracting and procurement opportunities for SBD's. SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Under-utilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.