

REQUEST FOR PROPOSAL
for
Professional Services

August 2010



California Association of Public Information Officials

*1400 K Street, Suite 400
Sacramento, CA 95814*

Questions relative to this RFP should be directed to:

Jenny Peterson, CAPIO President

760 744 1050, x3169

jpeterson@san-marcos.net

REQUEST FOR PROPOSAL TO PROVIDE PROFESSIONAL SERVICES

The California Association of Public Information Officers (CAPIO), a private, non-profit corporation, is requesting proposals for the following services for the period Oct. 1, 2010, through June 30, 2011:

Professional Services

CAPIO is the largest state organization for public sector communications professionals. This proposal is based on CAPIO's membership of approximately 300 members.

The mission of CAPIO is to *"To promote awareness of the public information profession and its value, by advancing standards of integrity, recognizing excellence, and offering training and support for members."*

CAPIO's Board of Directors retain all discretion and control over the scope and implementation of CAPIO's work program.

Proposal Submission Guidelines

Each proposal may be delivered via U.S. Mail, in person, e-mail or express courier (electronic delivery preferred) and received no later than **5 p.m. on Friday, Sept. 24.**

To be considered for selection, submit proposal to:

Jenny Peterson
Communication Officer
City of San Marcos
1 Civic Center Drive, San Marcos, CA, 92069
E-mail: jpeterson@san-marcos.net

CAPIO is not responsible for late mail deliveries or postmarks. Proposals received in the mail after the deadline will not be accepted regardless of their postmarked date. Proposals cannot be accepted by facsimile.

No proposal will be accepted unless it follows the format outlined by CAPIO for this project. Please review the entire proposal request before submitting your proposal. Incomplete submissions may be rejected as non-responsive.

For questions about the submittal process, please contact CAPIO President Jenny Peterson, 760 744 1050, x3169 or jpeterson@san-marcos.net.

Format for Proposal Submission

Vendors must provide one original and three copies of each proposal. Each proposal shall be presented in the following format:

- Black and white
- 8 ½ x 11 white paper, double-sided
- Stapled in the upper left
- Free from graphics or photos
- A cover page with the name of the firm, date of submission and the words, "CAPIO Professional Services."

Proposal Content

The following items must be submitted with your proposal. Forms are provided at the end of this request for summary company information, personnel information and cost summaries. Omissions may be cause to consider your submittal non-responsive at the CAPIO's sole discretion.

- Completed Proposed Cost Summary Form (*Part A, Part B or both*)
- Vendor Information Summary Sheet
- Project Team Member(s) Information Sheets
- Statement of Technical Ability and Experience
- Statement of Ability to Provide Services
- Statement of Unspecified Value-Added Offerings

Do not submit extraneous marketing or promotional information.

SCOPE OF WORK: DESCRIPTION OF PROFESSIONAL SERVICES

Please note that there are two options available for your response with regard to cost of services: Part A (items 1 through 4) refers to administrative services and Part B (item 5) refers to financial services. Your proposal may include a cost summary for only Part A or Part B, or for both.

PART A

1. MEMBERSHIP SERVICES

Vendor will provide assistance with membership customer service duties, including answering and returning phone calls to a dedicated CAPIO telephone line; e-mailing requests for information through the website; mailing new member packets and following up with potential members; and coordinating any necessary follow-up to maintain outstanding customer service for CAPIO members.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

2. MEMBERSHIP DATABASE AND TECHNOLOGICAL SERVICES

A. CAPIO database: Vendor will help maintain the CAPIO database, including timely entry of membership information; generation of dues billing, including but not limited to renewal and second notice letters and invoices; process membership renewal payments by credit card and check; and produce mailing labels and membership statistics for board reports and other membership items that are a function of up keeping member information. Vendor to work with membership chair to ensure follow-up on non-renewing member payments and the ongoing accuracy of the membership database.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

B. Online registration: Vendor will manage all background work to set up merchant accounts as necessary to support online registration for CAPIO, including conference registrations and regional workshops. The vendor will also manage the online registration's technical support, reports and setup of features.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

- C. Listserv maintenance:** Vendor will maintain an electronic listserv for CAPIO. The listserv will be updated and moderated by the Vendor at the direction of CAPIO's president. The Vendor will forward correspondence and newsletters from CAPIO to this list as directed by CAPIO's Board of Directors.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

3. ANNUAL CONFERENCE , REGIONAL TRAINING AND NETWORKING EVENTS

A. CAPIO Annual Conference and Awards Program

The Vendor will provide conference-related services for CAPIO, including:

- Pre-registration, processing of registration payments and management of conference database, including name badges and ribbons.
- On-site conference coordination for registration, event set-up and board meetings.
- Coordination with CAPIO conference committee on conference program, awards program and schedule. Vendor will participate in monthly conference planning committee calls, assist with preparation of conference registration packets and coordination and planning of conference sessions as requested.
- Coordination of conference and/or award program-related materials, including e-mail requests, database management, conference material updates, proofreading and editing of documents, ordering supplies and/or food, and evaluation forms.
- Customer service for members before, during and after the conference and awards program who have questions about the conference and/or awards program, schedule and registration information.
- Provide any other support required for a successful annual conference. (Vendor to identify additional areas that have not been included in above list.)

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

B. Other Training and Networking Events

The Vendor will provide the following services for CAPIO training and networking events, including:

- Pre-registration, processing of registration payments and management of CAPIO database, including name badges and ribbons.
- Vendor will assist with training materials and coordination and planning training/networking sessions as requested.
- Coordination of program-related materials, including e-mail requests, database management, conference material updates, proofreading and editing of documents, ordering supplies and/or food, and evaluation forms.

- Customer service for members before and during the event that have questions about the program, schedule and registration information.
- Provide any other support required for successful trainings and networking events. (Vendor to identify additional areas that have not been included in above list.)

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

4. BOARD SUPPORT

The Vendor will provide assistance with all CAPIO Board of Directors' meetings, including taking minutes during the monthly conference call, sending out board meeting agenda at least three days' prior to the meeting, scheduling conference lines, securing of space, food and drinks for in-person board meetings (in conjunction with the meeting planner). Vendor will participate in monthly CAPIO board meetings to give written and verbal reports, as requested. In addition, Vendor will send out board communication through the CAPIO listserve and draft letters and correspondences to members addressing board-related issues. Vendor will also send out CAPIO election materials to members.

The annual conference takes place in mid-April. Additional board events are held on an as-needed basis. The Vendor will respond to and/or forward all correspondences to the proper CAPIO board member(s) for action and/or information.

There are 11 members on the CAPIO Board of Directors.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

PART B

5. FINANCIAL SERVICES

The Vendor, with input from the CAPIO Board of Directors, will provide all accounting support for CAPIO business. This accounting support includes: providing a monthly financial statement showing revenues, expenses and balance sheet accounts and mail copy to the CAPIO treasurer by the twenty-fifth (25) day of the following month; production of a bi-weekly CAPIO check register; depositing all funds received by CAPIO in a federally insured institution within California in CAPIO's name; processing all payments, checks, refunds and invoices and keeping necessary records, etc, for the annual conference, regional trainings and networking events; disbursing funds either upon approval of CAPIO's executive committee or other agreed process; coding invoices and cutting checks; investment management, including fund transfers as necessary to cover checks; processing credit cards and check batches for dues billings.

Current budget is approximately \$105,000 annually.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

A. FILINGS

The Vendor will prepare and transmit CAPIO's Secretary of State Annual Corporation Filing; use and sales tax reports (as required); and Internal Revenue Service Form 1099s; Internal Revenue Service Form 990; Non-Profit Information Report; Franchise Tax Board Form 199; Non-profit Information Report; and other Internal Revenue Service or Franchise Tax Board forms, if applicable.

The proposal must provide the following information on the Cost Summary Form:

- Estimated hours
- Person(s) responsible
- Projected yearly cost

PERSONNEL REQUIREMENTS

Vendors shall describe the qualifications of the proposed project team on the form provided and shall include:

- Name and title
- Proposed role on the CAPIO project team
- Percentage of time each member of the project team is available to work for CAPIO
- Number of years of professional experience
- Experience, if any, working for the CAPIO or similar organizations handling activities listed in the scope of work

Please use copies of the form provided at the end of the RFP to provide information.

CAPIO reserves the right to evaluate the competency and responsibility of all proposing service companies and to evaluate the ability of any proposing company to perform all conditions of the contract to assure the award of this contract to a firm able to produce the quality of service required and intended by these specifications.

ADDITIONAL INFORMATION TO BE INCLUDED IN PROPOSAL

Vendor's Statement of Unspecified Value-Added Offerings

Please describe any services offered that will provide added value to CAPIO. If no such services are provided, state, "None."

Vendor's Statement of Technical Experience and References

The vendor is required to state what work of a similar character it has successfully performed and to give references, with telephone numbers and addresses, which will enable CAPIO to judge the vendor's responsibility, experience and skill, and business standing.

Technical Experience (form provided)

Describe vendor's technical experience and qualifications related to the scope of work, including which services the vendor provides and which services it does not. Include experience with the following, if applicable to the services provided:

- Proficiency using Mac and/or PC software, MS Word, Excel, PowerPoint
- Knowledge of financial management software
- Knowledge of financial management practices and procedures

References (form provided)

The vendor is required to provide a minimum of three (3) references, including name, title, telephone number, e-mail address and mailing address, where work was performed within the past three (3) years of a similar size and nature to this contract. Work with organizations serving public sector professionals should be included, if applicable.

VENDOR INFORMATION SUMMARY SHEET

Company Name	
Parent or Ownership	
Address	
Telephone Number	
Fax Number	
E-Mail Address	

**Management person responsible for direct contact with CAPIO
and services required for this RFP**

Name	
Title	
Telephone Number	
E-Mail Address	
Yrs. of Experience	
Yrs. Of Directly Related Experience	

PROJECT TEAM MEMBER(S) INFORMATION

For day-to-day servicing of account

Name, Title	
Proposed Role	
Time Available for Project (%)	
Yrs. Of Experience	
Yrs. Of Directly Related Experience	
Additional Information <i>(if desired)</i>	

Name, Title	
Proposed Role	
Time Available for Project (%)	
Yrs. Of Experience	
Yrs. Of Directly Related Experience	
Additional Information <i>(if desired)</i>	

Name, Title	
Proposed Role	
Time Available for Project (%)	
Yrs. Of Experience	
Yrs. Of Directly Related Experience	
Additional Information <i>(if desired)</i>	

Include as many pages as required to describe project personnel's qualifications.

Cost Summary for Professional Support Services

Part A (Administrative Services)

Item	Description	Est. Hrs.	Annual Cost
1	Membership Services		
2	Membership Database / Tech. Services		
2-A	Database		
2-B	Online Registration		
2-C	Listserv Maintenance		
3	Training and Conferences		
3-A	Annual Conference		
3-B	Other CAPIO Training		
4	Board Support		
	Total		

Part B (Financial Services)

Item	Description	Est. Hrs.	Annual Cost
5	Accounting and Financial Duties		
5-A	Filings		

Part A and Part B Combined (If applicable)	Total Cost _____
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Please list below any other services that are being recommended and provide a cost estimate for providing those services.

Additional Recommended Service	Cost Estimate

STATEMENT OF TECHNICAL EXPERIENCE

Please describe experience and qualifications related to the Scope of Work, including any services listed which cannot be provided.

COMPUTER PROFICIENCY (Mac and/or PC software, MS Word, Excel, PowerPoint, etc.)
FINANCIAL MANAGEMENT SOFTWARE
FINANCIAL MANAGEMENT PRACTICES AND PROCEDURES
SERVICES IN SCOPE OF WORK WHICH WILL NOT BE PROVIDED

PROFESSIONAL REFERENCES

Include reference information (*minimum of three*) where work was performed within the past three (3) years of a similar size and nature to this scope of work. Work performed for organizations serving public sector professionals should be included, if applicable.

Company Name
Address
Contact Name and Title
Telephone
E-mail

Company Name
Address
Contact Name and Title
Telephone
E-mail

Company Name
Address
Contact Name and Title
Telephone
E-mail

Company Name
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