

## INVITATION TO TENDER

### 1.0 Introduction

BSHAA is seeking to procure an integrated membership management system and flexible website bringing a contemporary appeal to meet the needs of a vibrant and growing organisation.

### 2.0 Context

As both a professional body and a membership organisation, BSHAA must serve the dual purpose of providing authoritative guidance to a regulated profession, whilst also providing benefits that help members to be successful in both the clinical and commercial elements of their role.

BSHAA has various classes of membership including students, registered professionals and associates, totalling around 1600 current members.

The membership database is used to support BSHAA's own administrative membership management services, including historical data related to class of membership and professional standing, where permitted by our legitimate interests as a professional body. Data held on individual members, and services available to members may vary according to member class.

As well as supporting the usual administrative processes of membership management, the member database is also a vehicle for providing value-added services direct to members. It allows members to maintain confidential records of their own professional standing for audit purposes, whilst also providing a mechanism through which they can manage publicly available aspects of their professional profile within the authoritative and independent context provided by their professional body.

The integrated platform must be capable of selective and bulk marketing to members, compliant with GDPR and PECR regulations, fully supported by performance monitoring tools and campaign analysis.

As a provider of education and continuing professional development opportunities to members, the Customer relationship management System (CRM) must provide the usual commercial management tools for efficient administration of course fees and sale of other member products. For training and professional development courses and events, the sales process must be closely integrated into the members' own record of participation in relevant training and development events, including records of each events' intended learning outcomes, with provision for them to maintain their own reflective practice log in a secure and confidential environment.

The web-site is the main vehicle through which members access a wide range of professional support services, some of which are freely available, with others being firewall protected to members' only. A further tier of security enables confidential materials, and pre-publication materials to be restricted to board members and working teams.

With increasing digitisation of resources, as the key gateway for members, the website platform must enable curation of a rich variety of information sources, including formal clinical and business guidance documents, education and training videos and webinars, a digital magazine to complement our long-standing printed professional journal, templates for members to download and tailor to their own business needs, and to act as a hub for exchange of ideas within special interest groups which may support open membership or be closed. It must also interface with relevant social media platforms, and provide seamless integration with video and voice conferencing services for both broadcast and interactive meetings.

## **3.0 Requirements**

### **3.1 Functional requirements**

The new service must provide a comprehensive and flexible service:

- a fully supported GDPR compliant database of member information;
- direct member control over consumer-facing aspects of membership information, including options for members to manage their own listings and product offering;
- central administrative function for maintenance of relationship management information;
- analysis and profiling capability to group and extract member lists by selected criteria;
- direct marketing and bulk email communication services to member lists or groups, including mail-merge facility;
- order management and payment services (direct debit and card payment) for annual membership renewal and product sales;
- ability for bulk update of membership renewal to support group membership schemes;
- individual member-level management of professional development records, including bulk data import personal record keeping at individual member level;
- product sales and support for professional development/ education/ training, including transfer of key course data (e.g. learning outcomes) into individual member-level records of Continuing Professional Development (CPD)
- integration of event/ education product management data with CPD records on completion of product/booking sale;
- member control of tailored extract and reporting of CPD records;
- document / library management service for search and secure access to professional guidance, webinar, blog, vlog, digital book and bulletin services;
- fully branded contemporary-style website to act as an attractive portal with both open and firewalled access to above member services and to public advice;
- website must be supported by appropriate tools for effective search engine optimisation;
- website must be supported by a range of business intelligence tools to enable effective performance monitoring and support informed decision making;

- website management tools to facilitate flexible and agile refresh and maintenance of professional image;
- provision of a “find my audiologist” tool to enable public search for an audiologist by name and/or location, and to permit members to provide clear marketing information to assist with lead generation.

### **3.2 Operational requirements**

Operationally, the tender must address the following operational requirements:

- 24x7 operation with agreed notice periods for maintenance downtime;
- full backup and recovery maintenance services;
- fully compliant cybersecurity platform with multiple tiers of access security enabling access control to be defined by group profile;
- self-administered secure password management service;
- backup, recovery and maintenance support services for all database contents;
- deposit and maintenance of source code and fully recoverable configuration in escrow;
- service level agreement specifying fault fix and recovery times, independently for the member database platform, the document library and the website;
- must be operated and maintained on fully supported versions of all underlying hardware and software platforms;
- must be supported on a software as a service platform;
- support for secure app integration with member database and web platform;
- dedicated and unique host IP addressing without fear of blacklisting, either from BSHAA’s own member communications and campaigns, or from any other service provided by the hosting services.

### **3.3 Migration and integration**

The successful provider will be responsible for understanding the current data model and to manage the successful migration of all current member data from the current platform, including:

- build an appropriate shadow platform and demonstrate that there is no loss of data or functionality, prior to cut-over to the new platform;
- understand the data model and ensure that there is a clearly documented maintenance pathway for individual members, member support staff, backed by a timely technical support if needed;
- ensure no service outage arising from the cutover process;
- ensure that member renewal payments and product sales are not materially affected by the platform switch;
- complete the migration and permanent switch-over by January 2021.

### **3.4 Relevant experience**

As a professional body, the majority of BSHAA’s members are regulated professionals, and it is essential that the service provider can demonstrate experience in providing both membership and professional services, and understanding the tensions that can arise between the two. Bidders should demonstrate:

- practical experience of supporting membership organisations to manage effective value-focused engagement with their members;
- practical experience of working with professional bodies to ensure members are supported to maintain their professional registration and meet evolving professional standards;
- empathy and understanding of the context within which caring professionals practise, especially where that relates to hearing care or similar service;
- bidders must guarantee a minimum of 3 years support, with potential contract extension for a further 3 years in one year increments, subject to performance and market-value testing;
- bidders are advised that the total available budget for the first three years will be in the region of £25000, to include all license, delivery and support costs;
- bidders should provide indicative annual costs for subsequent years, including daily chargeable rates for additional out-of-scope improvement.

### 3.5 Commercial considerations

The successful bidder will demonstrate an acceptable price/value offer to meet the above requirements. BSHAA is not bound to accept the lowest price offer, if additional value is clearly demonstrated by another provider.

Bidders must demonstrate that they have the capacity and capability to complete the work by January 2021, and to provide a resilient ongoing support service which will meet the service level agreement for timely restoration of service in the event of serious system failure.

Bidders must demonstrate that they have a strong financial basis with the resilience to sustain the economic challenges anticipated over the next few years, including any potential downturn from Covid 19 or Brexit.

### 4.0 Tender response

Bidders are invited to submit their proposal for provision of the service as described above, including:

- statement of compliance against these requirements, with itemisation of any non-compliance;
- clear assurance of the availability of resources to meet the above specification
- if phased delivery is suggested, a clear and guaranteed phasing timetable should be provided, explaining how the incremental deliveries will be tested and guaranteed;
- evidence of previous similar work, including satisfactory references;
- demonstration of working with organisations representing regulated professionals;
- clear demonstration of interest in and/or empathy with similar caring professions.
- evidence of a clear project and risk management methodology;
- statement of key risks and their mitigation.
- copies of the last 2 years' accounts

Bid responses should be returned to [chiefexecutive@bshaa.com](mailto:chiefexecutive@bshaa.com) by 5pm on 3<sup>rd</sup> December 2020, including full and final price offer.