



Request for Proposal

Technology and Business Solutions Assessment

RFP Release Date: 1/8/18

Proposals Due: 2/16/18

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Through research, education, and technology the International Society of Arboriculture promotes the professional practice of arboriculture and fosters a greater worldwide awareness of the benefits of trees. As a membership association and the primary credentialing body in the arboriculture industry, the ISA has over 24,000 members and over 37,000 credential holders across the globe.

Background:

ISA is seeking a comprehensive technology assessment that will evaluate the organizations technology systems, operations and use, and compare to best practices. Ideally, this assessment will be tailored to the unique role that ISA holds as an industry leader and proactive partner to similar parallel industries. ISA's main office is in Champaign, IL. We have over 50 employees and a 2016/17 total revenue of over \$9 million.

ISA's business model is tied to financial service agreements with chapters and professional affiliates that play a significant role in feeding our membership base as well as our credential holder revenue stream. Educational products and services augment our business model.

The organizations on premise network includes a SAN, 4 physical VMWare Hosts, 1 vCenter Server, 19 virtual and 1 physical Windows Server, 60+ workstations, 20+ laptops, and a fiber-optic internet connection (100Mbps up\down).

Many of the core business functions rely on a custom built database. ISA hosts multiple web sites including isa-arbor.com, treesaregood.org and itcc-isa.org. The web sites are heavily integrated with ISA's custom database. Microsoft Dynamics GP is used for financial management and ERP. Infrastructure has been created allowing the integration and flow of information between web sites, database systems and Microsoft Dynamics GP.

Aforementioned core business functions generally include (but are not limited to) the following functions described by department:

Member Services: Member profiles, membership and renewal fee / payment processing, invoicing services for chapter memberships, selected member benefit tracking, career center services, web store purchase imports, etc. This is an area where there is an identified need for automation of the manual collection and processing of each these functions in order to enable the team to focus more efforts on outbound sales efforts, which would mean making sure they have the systems in place to execute and track such efforts.

Credentialing: Exam application collection, vetting, processing, and archival, storing ANSI/ISO accredited exam test question bank, exam scheduling (CBT hosting/administration services outsourced to third party exam administrators – Pearson VUE), traditional pencil and paper exams distributed and graded in house) exam scoring and data management, notifications, and coordination of credential card distribution, collection, review, coding and archival of Continuing Education Credit documentation. Managing registrations, material delivery, and assessment processes for qualification (certificate based) workshops and exams. Department has discussed possibility for external credentialing management software systems to implement management of our credentialing programs.

Educational Products and Services: This department is responsible for the ISA erial publications (Arborist News and AUF “Arboriculture and Urban Forestry”), the development and publishing of various industry books, bmp’s, standards manuals, study guides, curriculum for workshops, podcasts, online learning, integrated and standalone quizzes that earn CEU’s. This department is looking to delve deeper into the digital learning space with app development, blended/virtual learning spaces, webinars, and extensive use of video. The department is shifting to an agile mode of instruction design to shorten development time. a. They are starting to focus on

mobile delivery of content that will include micro learning and interactive activities. They are also looking to improve efficiencies and advance in the publishing area with digital delivery options as well as print on demand functionality and author/editor/trainer management resources.

Sales & Marketing: This department is responsible for promoting the brand and the products to new and existing audiences and responsible for the design and user experience associated with the website. A new ISA website that is a hybrid model is getting ready to launch, with some of the newer pieces being built on a DNN framework, while reskinning some of the existing pages to appear consistent for the moment. Integrations are an opportunity to explore during this analysis. This department performs the traditional outreaches via press release, e-campaigns, web delivery, social media, and some print. They also support each of the teams with things like graphic design and invoice delivery. There is work being done to examine bringing publication layout in house. This department also manages ISA's annual conference and various other meetings and events, both domestic and internationally. The online registration process is critical to providing these event services. Finally, this group conducts market research by utilizing data from multiple sources (including the ISA database) to query and synthesize information that guides strategic decisions.

Human Resources: This department consists of the traditional HR functions, as well as the compliance and ethics roles. Technologies used in this department that are independent of the database include the HRIS/Payroll (Paylocity) and Applicant Tracking systems (Applitrack), as well as the Document Control System (PolicyTech). We are cautiously considering adding on the ATS system that Paylocity offers to have that function integrated into the main HRIS.

Finance and Operations: The accounting, shipping, facilities and IT functions reside in this department. Each of these areas are heavily tied to the existing database as mentioned in the intro of this section

with the database being tied to the web integrations, the Microsoft Dynamics GP financial system. As an international organization, currency and payment opportunities for efficiency are being analyzed. Additionally, the organization also currently relies heavily on an external SharePoint site that allows us to collaborate with external teams such as the Board of Directors and various committees. Our IT team supports the in house users as well as provides various services that are tied to our database, such as our own election services as well as providing election services to our chapters upon request. They also provide various other services to our chapters, affiliated organizations and professional affiliates upon request.

ISA internal systems and web sites are currently constructed using:

- Microsoft SQL Server
- ASP.NET Web Forms (VB)
- HTML
- CSS
- Javascript
- DNN
- SQL Server Reporting Service (SSRS)
- Microsoft Dynamics GP
- Integrations with third party vendors (Authorize.net, Latitude Learning, ePaperflip, SharePoint, Fry Communications...)
- We are in the very early stages of moving from VB to C# and from WebForms to MVC.

Scope of Services:

ISA is seeking proposals from consulting / advisory firms to perform a comprehensive assessment of Information Technology including people, process, and technology. ISA wants to identify high-value items for improvement that are not currently known, planned or contemplated (blind spots) and understand the strengths of its

current technology and processes. Ideally, ISA seeks to compare itself to similar organizations based on size and complexity.

Primary Goals:

- To assess the current state of technology, the degree of IT and business alignment, and the effective use of technology throughout the organization.
- To make recommendations to improve efficiency and effectiveness of IT services, both infrastructure and applications.
- To provide an assessment of the strengths, weaknesses, opportunities and threats (SWOT) of ISA's technology and technology services.
- To make recommendations for opportunities of improvement including, but not limited to the following areas:
 - Technology Strategy and Application
 - Review current strategy technology documentation and process. Gather input from relevant stakeholders. Compare to similarly sized organizations, note the current strengths and make recommendations to improve the current plans and processes. Recommend new technology and strategies for implementation over next three (3) years.
 - Assess stakeholder level of satisfaction with technology and process in their respective areas of practice.
 - Assess current three year map of prioritized projects and make recommendations for an appropriate level of technology investment going forward.
 - Technology Resources and Organizational Design
 - Review current staffing and plans as well as use of contract resources. Compare to other similarly sized organizations based on complexity, headcount, and general fund revenue size.

- Assess technology team's knowledge management and cross training practices and opportunities.
- Infrastructure and Operations
 - Examine relevant documentation, gather data from key stakeholders. Note strengths and areas for improvement.
 - Review service level objectives metrics within Operations. Note strengths and recommendations for improvement.
 - Review current processes including but not limited to Help Desk, System Administration, Backups, Patch Management, Release Management, and Change Management. Note strengths and provide recommendations for improvement.
 - Evaluate Infrastructure & Operations and provide level of maturity using industry accepted model based on people, process, technology, and alignment with the business.
- Security and Risk
 - Note: Security assessment is excluded from this RFP request. ISA will be undertaking a comprehensive security assessment independent of this RFP except for the items noted below.
 - Review the critical technology components of ISA's IT Disaster Recovery and Business Impact Assessment, Business Continuity Plan and Information Security Incident Response Plan. Provide a comparison to other similar organizations based on size and complexity. Note strengths and areas for improvement.
- Applications and Application Development
 - Review ISA's enterprise application architecture and provide recommendations. Assess the application selection and implementation process. Note strengths and recommendations for improvement.

- Review ISA's application portfolio. Assess ISA's key business applications whether custom or third-party and assess the quality of the application as well as stakeholder perception. Using existing documentation and stakeholder input. Note strengths and make recommendations for improvements.
- Assess Custom Database Application Development quality and throughput. Review current development Life cycle process. Note strengths and provide recommendations for improvements.
- Assess Application maintenance. Note strengths and provide recommendations for improvements.
- Assess level of business use and adoption of applications. Note strengths and provide recommendations for improvements.
- Business Intelligence
 - Examine relevant documentation, assess data architecture and data quality, gather data from key stakeholders, review sample work products including dashboards and reports, note strengths and areas for improvement.

Proposal Requirements

- Please provide a company description, a copy of the most recent financial statements, and years in business.
- Please provide examples of applicable consulting services and sample deliverables like those described in this RFP.
- A summary description of the proposed approach, major benefits, and timetable and milestones for completing the Services requested including details on how the Respondent would engage with ISA, the availability of analysts (time constraints, limits in frequency), research content available,

and description of any / all tools, templates, documentation, etc. offered as part of the proposed approach.

- A cost proposal for the Services is requested.
- A description of the value and return on investment that ISA should anticipate from the Services.
- Indicate the name, title, telephone number and email address of the individual who will be the principal contact for ISA.
- Bio's and or resumes of consultant(s) who would be assigned to provide the Services.
- Names, phone number, and email addresses of contacts for three (3) client references.

For selected finalists, upon signing a limited confidentiality / non-disclosure agreement, background and strategic information that can be provided to respondents to use in the assessment includes, but is not limited to, ISA strategy information, IT strategy and roadmaps, organizational charts, technology budget and trends, service level objectives, system models, prior audits and responses, customer satisfaction surveys, network diagrams, and policies and procedures.

ISA will consider all the following criteria in evaluating the proposals:

1. **Quality.** Examples of similar work and sample deliverables should be provided and show evidence of high-quality, thoughtful and valuable recommendations that are tailored to ISA's strategy while taking into consideration future industry and technology trends. Ideal deliverable samples are clear, concise, and visual and can quickly convey information to an executive audience while still providing enough detail so that recommendations are clearly understood and are actionable.

2. Type of engagement and timeline. The approach, methodology and length of time to conduct the assessment and provide a deliverable will be a factor. Ideally, ISA would like to start the assessment as soon as a provider is selected and finish as quickly as possible, as this will influence several future decisions.

3. Innovation. Work product provided should clearly show evidence of fresh insights and innovative recommendations that would help move the business forward.

4. Cost. Proposals should explain how you will maximize value to ISA while minimizing costs. Include any available discounts and rate concessions that may apply. Note: ISA is a nonprofit 501 (c)5.

ISA reserves the right to reject all proposals after reviewing all responses to this RFP. ISA is not required by law to conduct this RFP and reserves the right to cancel or withdraw this RFP at any time and for any reason. In addition, ISA reserves the right to negotiate the terms of the responses with any respondent prior to commencing services and to negotiate with other respondents if negotiations are not concluded with any selected respondent(s).

ISA reserves the right to select one or more firms for engagement. Engagement of a firm does not guarantee a firm any percentage or other allocation of business from ISA. ISA will allocate its business to firms as determined necessary and appropriate. Each approved firm will execute an engagement agreement satisfactory to ISA.

Submission Process:

Electronic responses to this request for proposal must be received by ISA no later than 4:00 pm, Central Time, on February 16, 2018 at the following email address:

Caitlyn Pollihan, Executive Director cpollihan@isa-arbor.com.

Note: The email subject line must be "RFP Technology and Business Solution Assessment."

Requests for additional information and/or questions and requests for clarification may be sent, via email, to Caitlyn Pollihan, cpollihan@isa-arbor.com.

Firms and their representatives should not contact ISA staff or Board members regarding this RFP.