American Association of Orthopaedic Executives

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Request for Information

American Association of Orthopaedic Executives (AAOE)

Association Management System (AMS)

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Contents of this Request for Proposal

The American Association of Orthopaedic Executives seeks a proposal for association management system.

I.   Introduction to the AAOE

The **American Association of Orthopaedic Executives** (AAOE) is a national association of orthopaedic executives and office managers, representing over 9,000 orthopaedic surgeons. Orthopaedic executives usually hold the chief executive, non-physician position and are responsible for budgeting, financial management, human resource management, third party payor relations, government requirements, strategic planning, and marketing. AAOE members represent every practice size — from a solo practice to a 120-physician practice, and from a hospital setting to a university-affiliated group.

Since its founding in 1969, the AAOE remains the only organization of its kind promoting the educational and professional advancement of the orthopaedic executive. To date, AAOE has over 1,350 members.

Our Vision:
To set the standard for knowledge and insight as it relates to orthopaedic practice management. Foster Credibility that is universally recognized.

Our Mission:
To be the premier management association serving orthopaedic practice executives. To identify and provide unmatched peer to peer networking and to be recognized for educational excellence for orthopaedic executives.

Our Goal:
To set the standard for knowledge and insight as it relates to orthopaedic practice management.

Our Objectives:
- Provide **Content** and resources for orthopaedic practice executives
- Incorporate **Competence** and reflect excellence and high standards for orthopaedic practice management
- Encourage **Connections** to and between members, non-members, physicians and affiliated groups

Member Profile:
The typical AAOE member is employed with a private practice, primarily an orthopaedic group with an average of 5 to 6 orthopaedic surgeons and a staff of over 40. On average, AAOE members have 10 years of healthcare management experience and have been in their current position for nearly 8 years. Fifty-one percent of AAOE members are women and forty-nine percent are men. The average age is 48.

Governance Structure:
We are a member-run organization, who reports to the Board of Directors. We have 11 members on the Board. The positions held within the Board are President, President-Elect, Past President, Secretary, and Treasurer. We have seven councils and six committees, and four sub-committees. The list below breaks the councils, committees, and sub-committees down:
- Executive Council
  - Advocacy Council
    - Federal Legislation Subcommittee
    - Federal Regulations Subcommittee
    - Legislative and Regulatory Update Newsletter Subcommittee
    - State Societies Subcommittee
  - Education Council
    - Annual Conference Committee

Governance Structure (Continued):
- ▪ Benchmarking Committee
  - o Membership Council
    - ▪ ALPS Committee
  - o Communications Council
    - ▪ Technology Committee
  - o Elections Council
- Finance Council
  - o Audit Committee

Member Benefits:
Resources – Latest tools at your fingertips
- AAOE Live Learning Center. Access former webinars and conference content anytime, 24/7.
- AAOE Library. Online resource of useful and customizable documents, forms, and templates.
- Legislative Action Center. Timely information and tools to help you get involved with legislation affecting the orthopaedic profession.

Information Sharing – Up-to-date publications, education, and services
- FREE Webinars on highly relevant subjects. Access from anywhere with as many participants as you like.
- AAOE e-Newsletter. Weekly e-news brief that delivers up-to-date information to your inbox.
- The OrthoActivist – A Legislative and Regulatory Update. A monthly newsletter dedicated to the legislative and regulatory measures at the state and federal levels affecting orthopaedics.
- Coffee Talk from the Hill. A weekly Washington, D.C. update meant to keep the reader informed about the environment on Capitol Hill. Provides some health care policy news but is focused on what is happening in the District regardless of the policy topic.
- AAOE Annual Reports. Information on the association's financial health and councils and committees involved in AAOE's success.
- AAOS Headline News. Stay up-to-date on the latest orthopaedic-related news.

Professional Development – Current professional career assistance
- Education Toolkits. Toolkits vetted by your peers provide links to articles, podcasts, websites, videos, and webinars that support best orthopaedic management practices.
- ORTHOEd. A peer-reviewed certificate program.
- Career Center. Look for a position in orthopaedic practice management, or find the perfect practice executive.

Networking – Access to Who's Who in today's orthopaedic practice management
- AAOE Listserv. Real time text interaction with peers for questions, thoughts, opinions, resources, tools, forms, and more.
- AAOE Leaders in Practice Success (ALPS) Program. Mentors help Mentees truly get a grasp on the skills necessary to successfully conduct the day-to-day management of an orthopaedic practice.
- AAOE Annual Conference. Members have access to the ONLY conference dedicated to orthopaedic practice management professionals. With over 70 educational sessions and multiple networking opportunities the conference is a must-attend event where you will walk away with new strategies, professional connections, and the knowledge base to move your organization forward.

Staff Positions at AAOE:
We are composed of 7 staff people with the titles:
- Executive Director
- Education and Meetings Manager
- Meetings Coordinator

- Government Affairs Coordinator
- Marketing and Communications Coordinator
- Membership Coordinator
- Administrative Coordinator

II.   Statement of Need

The American Association of Orthopaedic Executives seeks a proposal for an association management system (AMS).

III.   Expected Proposal Deliverables

Basic AMS & Website Requirements:

- Ability to transfer data from previous AMS and create customizable data storage for extensive member and company data
    - Administrators have the ability to track our annual conference booth draw, exhibitor points, sponsorship money, floor plans, etc.
    - Administrators can have access to a report function for membership demographics, behavior, and participation
    - Administrators have access to dashboard capability with graphs and charts
    - Administrators have the ability to check for duplicate "master" records at data entry
- Manage individual membership data and group membership data and payments
    - Members automatically receive receipts for any payments made
    - Members can automatically click a link or button with if they have forgotten their password and it will send them their login credentials
    - Members can update their personal profile using text box answer fields
    - Administrators have the ability to track and report on certain key data points
    - Administrators have the ability to allow one person of the group to have access to the group profile information and that member be able to pay dues for the entire group online that will reflect in each individual member's profile
    - Administrators have the ability to easily run reports on how many members are a part of group membership and the number of members each group has
    - Administrators have the ability to run reports of how many dropped and lapsed members easily and be able to convert to an excel spreadsheet
    - Administrators can easily run renewal reports
    - Administrators can automatically remind members when they login to their profile of when their membership is going to expire – automatically at 60 days, 30 days, etc.
    - Administrators have the ability to generate past-due notices and keep a history of when they are sent
    - Administrators have the ability to track member requests and communications
    - Administrators have the ability to update records of all individuals who are part of a group profile by updating the group profile
    - Administrators have the ability to password protect the individual member directory on website and have the member control for their own personalized listing
    - Have a practice directory that is open to the public and have the ability to have each member control their own personalized listing
    - Administrators have the capability of tracking member status of new, renewed, lapsed or rejoined
    - Administrators have the ability to require certain questions of a member in their profile before renewing their dues
- Webinar registration to verify member and nonmember pricing

Basic AMS & Website Requirements (Continued):

- o Administrators have the ability to edit what is required when registering for a webinar
- o Administrators have the ability to customize each webinar description and title
- o Administrators have the ability to automatically send a confirmation message or email with a calendar download for the webinar that will populate the appropriate time zone to members
- o Have the capability to automatically send a receipt for webinar purchases to members
- o Administrators can set up and allow coupon discount codes for webinar purchases
- o Administrators have the ability to run revenue reports for event items
- o Mass communication to registrants without being caught in spam filters
- o Have an intuitive webinar login such as only entering in name and email only for members
- o Ability to login once under a member's login section and not have to login again when registering for a webinar
- Easily accessible website
  - o Members have one login (their login for the website) to access even third party web addresses
  - o Administrators have the ability to edit every webpage on a moment's notice and be user friendly
  - o Administrators have the ability to have a revert/undo option when updating a webpage
  - o Administrators have the ability to have a preview option before making the webpage "go live"
  - o Logical and esthetically pleasing design and layout
  - o Ability to view the website on a mobile device
- Email function to send members, prospects, and exhibitors and track multiple group lists
  - o Administrators have the ability to track segmented marketing communications whether it be via phone, email, etc. and allow for a follow-up reminder of when to contact them
  - o Administrators have the ability to easily send segmented marketing communications
  - o Administrators have the ability to create a Peer Finder function where members can locate other members and send them an email based on geographic location, company size, number of orthopaedic surgeons, etc.

Integration with Other Systems:

For the below systems, please specify whether or not you currently have an integration system in place with these companies. If you do not, what would you integration solution be or do you offer something that can replace them?

- i. Integration
  - 1. E-show – annual conference registration system
    - a. Ability to incorporate all attendee, guest, speaker, and exhibitor registration
    - b. Ability to track exhibitor booth draw, exhibitor points, sponsorship money, floor plans, etc.
    - c. Ability to easily edit different registration forms
    - d. Ability to have attendee, exhibitor, and speaker service centers
    - e. Ability to track all session data including session name, track (topic area), speaker name, time, handouts, bio, picture, description, etc.
    - f. Ability to publish a schedule of events from the database based on all session and event information entered into the system
    - g. Ability to print different badge types

Integration with Other Systems (Continued):
- h. Ability to sell tickets for conference-related events subject to a maximum limit
- i. Ability to track all functions the registrant will be attending
- j. Ability to have discount codes
- k. Ability to have lead retrieval for exhibitors

2. OmNovia – webinar platform
   - a. Ability to manage registrations
   - b. Ability to create different user logins with different access
   - c. Ability to have a customized URL link at the end
   - d. Ability to upload different logos
   - e. Ability to download recordings of the webinars
   - f. Ability to allow attendees to enter the room prior to the webinar
   - g. Ability to type questions into a text box during the webinar
   - h. Ability to upload handouts

3. Constant Contact – email marketing software
   - a. Ability to send segmented email communications
   - b. Ability to easily customize the layout and design

4. Peachtree
   - a. Bookkeeping software

5. Multiview – our Live Learning Center
   - a. Ability to have a single sign-on with website

6. Job Target – career center
   - a. Ability to have a single sign-on with website

Budget:

Include a comprehensive budget and schedule with deliverables.

Qualifications:

- Describe the background of your company
- Describe the products and services offered
- Expertise of staff
- Availability of support staff
- Comprehensive budget and schedule with deliverables
- Experience in website design, website maintenance, and AMS

Recommendations:
Provide at least three written recommendations, or contact information for satisfied customers, with your proposal.

IV.	Criterion to be Used in Assessing Proposals

Proposal:
- Clear descriptions of the work to be accomplished to include objectives, goals and action steps.
- Expected outcomes.
- Recommendations of responsible group/persons for the work.
- Schedule of work/timeline.

Demonstrated Capacity to do the Work:
- Appropriate and relevant knowledge, skills, and experience
- Previous experience with healthcare associations or small associations
- Consensus building
- Creative approach for custom items

Cost:
- A thorough and feasible outline for costs including expected and maximum number of hours to cover costs, and any other costs associated.

V.   Submission Deadline and Contact Information

Please submit your proposal via email or hardcopy (faxed proposals will not be accepted) to arrive no later than 12:00 noon ET, Monday, October 20, 2014 to:

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VI.   Timing

Proposal submission deadlines:
- Electronic and hard copy (faxed proposals will not be accepted): Monday, October 20, 2014 by 12:00 noon ET.

Board of Directors discussion:
- Week of November 10, 2014

Notices sent out:
- Week of December 1, 2014

VII.   Optional – Feedback

Addy M. Kujawa, CAE, is a member of the ASAE Membership Section Council and is working with several association professionals to build a few tools and resources to assist associations with their AMS selection (processes, procedures, tools, and resources – this **not** who they should select). If you have time, and are interested, please send your thoughts on the following (anything will be collated and anonymous – your responses will **not** be shared with anyone individually):
- How did this RFI work for you?
    - What would have made it better/easier?
- What do you see as the top three errors association professionals make during the AMS selection process?
    - How could they avoid them or do differently?
- If you could give one piece of advice to association professionals during this process, what would it be?
- What are the most critical or top pieces of information you need to see in an RFI or RFP?
- What makes an RFI easier to respond to?
- Would you be willing to share any guidelines or tips for association professionals going through this process?
- Would you be willing to talk more or be interviewed for articles, sessions, tools, or resources about AMS selection? *(If so, please provide contact information)*
- Please feel free to add any other information, tips, tricks, guides, guidelines, advice, etc.
- If you would like your company name noted as a contributor, please let us know.

Thank you so much, in advance, for anything you are willing to provide toward our goal of assisting all association professionals with their AMS selection!