WIMSA
Membership and Collections Management System (MCMS)

Industry Day

August 9, 2018

**Please note: Today’s session is being recorded**
Welcome!

MG Marilyn Quagliotti, USA Retired is the Vice President for Development at the Women in Military Service For America Memorial Foundation

Ms. Zoe Patterson,
Business Engineering
Team Capital Gateway Consulting, LLC

Mr. Anthony DeWitt,
Enterprise Applications
Team Capital Gateway Consulting, LLC
# Industry Day Agenda

<table>
<thead>
<tr>
<th>TIME</th>
<th>TOPIC</th>
<th>PRESENTER</th>
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</thead>
<tbody>
<tr>
<td>10:00</td>
<td>Greetings; Administrative Comments</td>
<td>A. DeWitt</td>
</tr>
<tr>
<td>10:05</td>
<td>WIMSA Overview; Mission and Vision</td>
<td>MG Quagliotti</td>
</tr>
<tr>
<td>10:10</td>
<td>WIMSA Requirements Overview; Business Area Objectives (Scope)</td>
<td>Z. Patterson</td>
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<td></td>
<td>A. DeWitt</td>
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<tr>
<td>11:00</td>
<td>Break; Attendee Networking</td>
<td>A. DeWitt</td>
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<tr>
<td>11:20</td>
<td>Questions and Answers</td>
<td>A. DeWitt</td>
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<td>11:45</td>
<td>Closing; Key Dates</td>
<td>A. DeWitt</td>
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<td>MG Quagliotti</td>
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</table>
Disclaimer

- The information communicated today is not a guarantee of WIMSA’s course of action for obtaining services to implement a Membership and Collections Management System (MCMS).

- The information provided reflects current WIMSA intentions of how this acquisition should be carried out, and is subject to change based on a variety of circumstances, including input from Vendors.

- A solicitation is the only document that is relied upon in determining the WIMSA’s requirements.
Purpose

• To provide vendors with information regarding the WIMSA MCMS acquisition

• Create a dialogue between WIMSA and Industry to foster competition and collaboration

• Help assess interest in WIMSA’s acquisition needs

• Provide a forum for WIMSA and vendors to get acquainted with issues and concerns surrounding the WIMSA MCMS procurement
WIMSA Overview

HISTORY:

The Women In Military Service for America Memorial Foundation is a 501(c)(3) non-profit, charitable organization. WIMSA was established to honor women who have served in the United States Armed Forces. The Women’s Memorial was dedicated on October 18, 1997, and is endorsed by the Departments of Defense, Transportation, Veterans Affairs, and Interior. WIMSA recognizes all women who have served in or with the United States Armed Forces—past, present, and future; documents the experiences of these women and tells their stories of service, sacrifice, and achievement; makes their contributions a visible part of our history; illustrates their contribution equal to that of men in defense of our nation; and serves as inspiration for others.
WIMSA Overview - Mission and Vision

WIMSA’s CORE MISSION:

1. Honor & Document Past, Present & Future Women in the Military
   - People, Memorial & Artifacts
   - Preserving history and recognizing the extraordinary value of women in the military.

2. Educate on the Impact of Servicewomen
   - Technology & Digital Platforms
   - Tell the stories, educate the public, and be a source of information.

3. Be a Valuable Resource for All
   - Leadership, Strategic Vision, Management & Operations
   - Provide resources and support for all stakeholders and partners.
WIMSA Overview – MCMS

Membership and Collections Management System (MCMS) Objectives:

- Modernization through Technology
- Increased Membership, Capabilities, and Service Offerings
- Secure and Stable Technical Foundation
- Operational Enhancement
- Improved Information Management
- Increased Stakeholder Value
Membership and Collections Management System

- Comprehensive end-to-end Commercial-off-the-Shelf (COTS) solution to accomplish Membership and Collections management activities to include data management, reporting, data security, and training.

- Cloud-based or externally hosted (Applications Service Provider) solution and associated design documentation that provides a comprehensive Membership and Collections Management capability.

- Provides timely and reliable access to collections management data, membership and management data at all management levels to facilitate informed decision-making and planning.

- Provides a transition, including migration, of data from WIMSA’s existing 4D Graphical Database System to the COTS based MCMS solution that is efficient, thorough, and ensures no loss of data or data integrity.
Membership and Collections Management System

Features and Functions:
- Internal and External facing portals
- Searchable
- Membership and Collections Mgmt.
- Internal and External Correspondence
- Workflow, Alerts, and Notifications
- Integration Enterprise Apps (POS, Accounting, Payment)
- Reporting (Ad-hoc, Stored)
- User Interface (Data Entry, Edits)
- Rules and Validation
- Automation
**Membership and Collections Management System**

**System Roles:**
- Supporter
- Member
- Event Holder
- Foundation Operations Staffer
- Foundation Operations Supervisor
- Memorial Operations Supervisor
- Memorial Operations Staffer
- Accounting and Finance Supervisor
- Accounting and Finance Staffer
- Sys Admin

* Roles Based Security; Identity and Account Management; Audit
Membership and Collections Management System

Public Access: *Military Women Members & Supporters*

- On-line Donations and Payments processing
- Public vs. Private Data
- Account Registration
- Account Updates
- Artifacts Upload and Management
- Donation Account Balance Reporting
Membership and Collections Management System

WIMSA Foundation Headquarters: Operations

- Donations and Payments Management / Tracking
- Account Registration and Updates
- Artifacts Upload and Management
- Membership Correspondence
- Membership Reporting
- Inbound Marketing Campaign Response Processing
- Membership donated artifact tracking
- Member Print Processing
Membership and Collections Management System

Arlington Cemetery Memorial: Operations

- On-line / In Person Donations and Payments
- Member Account Registration and Updates
- Artifacts Registration, Upload and Management
- Event Financial Management and Reporting
- Event Holder Event Registration, Scheduling and Processing
- Member Gift shop / Catalog Purchasing
Membership and Collections Management System

WIMSA Finance: Accounting Operations

- Member Account Access
- Internal and External Compliance Reporting
- Account / System Reconciliation
- Cost / Financial Management
- Member – Supporter Donations / Event Financial Tracking
- Give Shop Tracking
- “Color of Money” tracking
Membership and Collections Management System

WIMSA Sales: 
*Sales and Marketing*

- On-line Donations and Payments
- Member/Supporter Account Registration and Updates
- Demographic Data Processing and Reporting
- Campaign Development
- Membership Data Analysis
- Post Campaign Analysis
- Ambassador Support
- Gift Shop Sales Mgmt. & Tracking

![Diagram of Membership and Collections Management System](image)
Membership and Collections Management System

WIMSA Collections Database:
- Oral History
- Digital Photographs
- Physical Artifacts
- Library Reference
Membership and Collections Management System

WIMSA Foundation Operations: Collections Management

- Artifact Donation Registration
- Artifact and Exhibit Management
- Partner Museum and WIMSA Collection Tracking and Management
- Digital and Physical Artifact Inventory tracking and Management
- Research Portal
- Searchable Historical data
- Reporting
- Correspondence / Receipts

Security

Foundation Operations

Collections Artifacts

Rules Validations

Members Researchers Supporters

Sales

Memorial Operations

Finance

8/9/18
# WIMSA PMO MCMS Engagement Artifacts

## WIMSA has made a significant investment in MCMS:

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Artifacts</th>
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<tbody>
<tr>
<td>WIMSA Business Process Walkthrough</td>
<td>Key Data Elements Identification and Data Dictionary Documentation; Sample Reports Inventory, Forms, Member Letters;</td>
</tr>
<tr>
<td>Preliminary Process Re-engineering</td>
<td>Importable BPMN Process To-Be Flows (Signavio); Activity and Requirements Matrix (ARM); Key Data Elements and Data Definition</td>
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<tr>
<td>PMO Support</td>
<td>WIMSA MCMS Communications Plan</td>
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</table>
Break/Attendee Networking
WIMSA RFI Objectives

• Ascertain methods, strategies, and best practice approaches vendors suggest for:
  o Implementation Delivery (e.g., Agile, Waterfall)
  o Data Migration, Cleansing, and Validation
  o Data Security
  o Program Management (e.g., PMBOK)

• Receive a Rough Order of Magnitude (ROM) of the costs associated with the recommended solution

• Receive Vendor feedback on the Draft WIMSA MCMS Request for Proposals (RFP)
WIMSA Request for Information (RFI) Overview

- An RFI for the WIMSA MCMS was released on July 30, 2018 to all interested vendors
- The RFI is part of WIMSA’s Market Research that will inform the Request for Proposal (RFP)

An RFI is not a request for proposal, request for quotation, or an invitation for bid nor does its issuance obligate or restrict the WIMSA to an eventual acquisition approach.
RFI Contents

1. Background
2. Purpose
3. Summary of Business Objectives and Target Solution
4. Solution Elements and Technology Landscape
5. Scope
6. Requested Information
7. Rough Order of Magnitude (ROM)
8. Submission Instructions and Formatting Requirements
   • Contractor Support
   • Primary Points of Contact
9. Appendix
   • Usage Information
   • WIMSA Policy and Regulations
   • High Level Functional and Technical Requirements
Q&A Panel
Thank You for Attending

Key Upcoming Dates

• July 30 – Request for Information (RFI) published
• August 9 – Industry Day
• August 15 – Publish RFI Questions and Answers
• August 23 – RFI Responses Due from Industry
• ~ September 2018 – Request for Proposals,
• ~ October 2018 – Vendor Demonstrations

All information presented will be available to interested vendors on the WIMSA website
Back Up Information
## WIMSA Business Objectives

| Membership and Donor Registration | • Includes the CRM for registration management and donation collection of donors and registered members.  
• Integrates seamlessly with a new redesigned WIMSA website.  
• Includes capabilities providing the membership and the public with tools for online access for membership registration and management.  
• Provides Workflow and data validations |
| Foundation Operations | • Includes the management and reporting of registrations and donations. |
Supporter and Member Management

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Supporters shall have the ability to create a supporter account to enable the following functions:</td>
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<tr>
<td>● To submit online donations and other payments to WIMSA</td>
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<tr>
<td>● To submit the online registration of eligible women in the military</td>
</tr>
<tr>
<td>● To receive email and paper communications from WIMSA</td>
</tr>
<tr>
<td>● To track financial transactions with WIMSA</td>
</tr>
<tr>
<td>● To track and view artifact, library or oral history donations</td>
</tr>
</tbody>
</table>

Within their supporter account, supporters shall have the ability to determine which information they provide is publicly available through the WIMSA website.

Within their account, Supporters shall have the ability to update the information they provide to WIMSA. This includes information such as name, address, phone number, email address, and other demographic details. This also includes service information, such as era, war conflict, open text experience, and more.

Within their account, supporters shall have the ability to update their payment information.

Within their account, supporters shall have the ability to update their military service information.

Within their account, supporters shall have the ability to upload multiple photos, designate one as a member’s profile photo, and update photos as needed.

Within their account, supporters shall have the ability to review a proof and order a Presentation Print.
### Supporter and Member Management

Members shall have the ability to create a supporter account to enable the following functions:

- To submit online donations and other payments to WIMSA
- To submit their online registration to become a formal member of WIMSA
- To receive email and paper communications from WIMSA
- To track financial transactions with WIMSA
- To track and view artifact, library or oral history donations

Within their member account, members shall have the ability to determine which information they provide should be publicly available through the WIMSA website.

Within their member account, members shall have the ability to update the information they provide to WIMSA. This includes information such as name, address, phone number, email address, and other demographic details. This also includes service information, such as era, war conflict, open text experience, and more.

Within their member account, members shall have the ability to update their payment information.

Within their member account, members shall have the ability to update their military service information.

Within their member account, members shall have the ability to upload multiple photos, designate one as a profile photo, and update photos as needed.

Within their account, members shall have the ability to review a proof and order their Presentation Print
WIMSA Business Objectives

The Foundation Operations Teams Responsibilities:

• Customer Support
• Management and oversight of WIMSA’s registered members and supporters.
• Monitoring the data quality of registered members and validation of member records
• Printing and mailing of the WIMSA Presentation Prints
• Donation oversight (Threshold Management)
• Providing ongoing feedback to the Accounting and Finance for reporting, regulatory, and compliance needs.
• Outgoing communications to Existing Members
• Execute stored and ad hoc reports
• Conduct outreach campaigns and member/supporter outreach as needed.
## WIMSA Business Objectives

| Memorial Operations | • Includes the management and reporting of Memorial events, registrations, and donations.  
| | • In addition, the Memorial and Event functionality should support and integrate with membership and donor registrations.  
| | • Provides Workflow and data validations and edits.  
| Sales and Gift Shop | • Clover is the point of sale system used in the memorial gift shop. The Clover POS shall be integrated with the Membership and Collections Management System to provide full visibility into a member’s or supporter’s gift shop purchases and donations.  
| | • Any gift shop purchases or donations should be tracked on the member’s/supporter’s account in the membership management system.  
| | • The system includes capability to integrate and support on-line sales and marketing and also mailing campaigns with funds receipt-tracking functionality.  

WIMSA Business Objectives

Memorial Operations:

<table>
<thead>
<tr>
<th>The memorial operations team shall have the ability to create, modify, or delete supporter and member records and associated supporter and member data.</th>
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</thead>
<tbody>
<tr>
<td>The memorial operations team shall have the ability to upload member photos for the member record.</td>
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<tr>
<td>The memorial operations team shall have the ability to search for supporters and members by their demographic details and/or service data.</td>
</tr>
<tr>
<td>The memorial operations team shall have the ability to merge member/supporter records in the event of duplicates.</td>
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<tr>
<td>The memorial operations team shall have the ability to run both scheduled and ad hoc reports related to members, supporters, and donations.</td>
</tr>
<tr>
<td>Using member and supporter data, the memorial operations team shall have the ability to automatically generate letters and other documentation as needed for supporter and member registration, donation follow up, and/or outreach campaigns.</td>
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<tr>
<td>The memorial operations team shall have the ability to escalate or assign member records, supporter records, and/or donations for review to other team members as needed.</td>
</tr>
<tr>
<td>The memorial operations team shall have the ability to generate print ready “presentation prints” based on member record data.</td>
</tr>
<tr>
<td>The memorial operations team shall have the ability to communicate with the member/supporter via email through the system. These communications should be stored on the member’s/supporter’s record.</td>
</tr>
</tbody>
</table>
**WIMSA Business Objectives**

**Memorial Operations:**

- Event holders shall have the ability to submit event request forms online.
- Event holders shall have the ability to submit event payments online.

- The memorial operations team shall have the ability to create events associated with a member or supporter record.
- The memorial operations team shall have the ability to manage details of each event.
- The memorial operations team shall have the ability to export a calendar of upcoming events.
- The memorial operations team shall have the ability to indicate if an event is public or private.
- The memorial operations team shall have the ability to request and collect payment from event holders through the system.
- The memorial operations team shall have the ability to manually enter payment information for events.
- The memorial operations team shall receive email notifications when an event request form is submitted.

**Integration with Existing Enterprise Software**
WIMSA Business Objectives

Memorial Operations:

| The gift shop employee shall have the ability to create or update member or supporter records. |
| The gift shop employee shall have the ability to search for supporters and members by their demographic details and/or service data. |
| The gift shop employee shall have the ability to log donations on the member or supporter record. |
| The gift shop employee shall have the ability to generate print ready “presentation prints” based on member record data. |
WIMSA Business Objectives

Event Holders:
• Members of the public, donors, or registered WIMSA members who wish to hold events at the Memorial.
• WIMSA hosts a variety of events at the memorial, from retirement ceremonies through larger conference type events.
• Submit an event request online or by using a paper event request application.
• Workflow: Event requests are sent to the Memorial Operations offices for follow up and further processing.

Integration with New WIMSA Website
## WIMSA Business Objectives

| Accounting and Finance | • WIMSA operates on the Connect8 financial accounting system. The new system capability includes the management, reporting, and integration points to support management of all cash flow related to donations, events, and sales.  
| | • Includes API functionality to support financial transactions integration. |
## WIMSA Business Objectives

### Accounting and Finance:

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
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<tbody>
<tr>
<td>Create, modify, or delete supporter and member records and associated</td>
<td>The accounting and finance team shall have the ability to create, modify, or delete supporter and member records and associated supporter and member data.</td>
</tr>
<tr>
<td><em>supporter and member records and associated supporter and member data.</em></td>
<td></td>
</tr>
<tr>
<td>Search for supporters and members by their demographic details and/or service data.</td>
<td>The accounting and finance team shall have the ability to search for supporters and members by their demographic details and/or service data.</td>
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<td>Merge member/supporter records in the event of duplicates.</td>
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<td>Run both scheduled and ad hoc reports related to members, supporters, and donations.</td>
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<td>Using member and supporter data, the accounting and finance team shall have the ability to automatically generate letters and other documentation as needed for supporter and member registration, donation follow up, and/or outreach campaigns.</td>
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<tr>
<td>Escalate or assign member records, supporter records, and/or donations for review to other team members as needed.</td>
<td>The accounting and finance team shall have the ability to escalate or assign member records, supporter records, and/or donations for review to other team members as needed.</td>
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<tr>
<td>Communicate with the member/supporter via email through the system. These communications should be stored on the member’s/supporter’s record.</td>
<td>The accounting and finance team shall have the ability to communicate with the member/supporter via email through the system. These communications should be stored on the member’s/supporter’s record.</td>
</tr>
<tr>
<td>Manually enter payment/donation information on the member or supporters record for any payment which were not made online.</td>
<td>The accounting and finances team shall have the ability to manually enter payment/donation information on the member or supporters record for any payment which were not made online.</td>
</tr>
</tbody>
</table>
# WIMSA Business Objectives

| Library, Archive, and Oral History Archive | • Includes the management and reporting related to the WIMSA library, collection artifacts archive, and oral history archive.  
• Also includes a public facing research portal functionality.  
• The system should integrate seamlessly with the pending new WIMSA website re-design having capabilities to provide the membership and the public with the capability and tools for online access to browse and research WIMSA’s vast, rich and varied archive collections of Oral History, digital collections of the contributions of women in the military. |

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WIMSA Business Objectives

**Archive, Library, Oral History:**

<table>
<thead>
<tr>
<th>The ALOH system should have the ability to scale as needed, as this database is expected to grow significantly in the near future</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ALOH system should provide reasonable response times for document search and retrieval, and the solution should have the ability to perform ingestion and archive functions without negatively impacting overall system performance for users.</td>
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<tr>
<td>The ALOH system shall have an internal portal for WIMSA ALOH employees to create and manage ALOH data</td>
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<tr>
<td>The ALOH system shall have an external portal for the public to search for information</td>
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<tr>
<td>The ALOH system shall have a login functionality for approved researchers to access additional information, and have the ability to save searches and queries.</td>
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<tr>
<td>The ALOH system must provide a standards-based architecture and open API that allows integration with other systems or middleware components, including existing legacy systems.</td>
</tr>
<tr>
<td>The ALOH database shall have the ability to search and pull member or supporter information from membership system to pre-populate ALOH data entry forms.</td>
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</table>
WIMSA Business Objectives

Archive, Library, Oral History:

<table>
<thead>
<tr>
<th>Requirement</th>
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<tbody>
<tr>
<td>The Membership System shall automatically display is an item in the ALOH database is associated to a member or supporter.</td>
</tr>
<tr>
<td>The ALOH system should provide a mechanism for authorized users to search for and retrieve ALOH information. In addition, the archive should provide the ability for certain external users to retrieve ALOH information.</td>
</tr>
<tr>
<td>The ALOH system shall have the ability to track the location and status of ALOH items that are loaned out to other organizations</td>
</tr>
<tr>
<td>The ALOH system shall have the ability to upload pictures, videos, audio files, and documents (e.g., jif, pdf, word, mp3, etc.)</td>
</tr>
<tr>
<td>The ALOH system shall have the ability to generate and send emails</td>
</tr>
<tr>
<td>The ALOH system shall have the ability to generate PDFs from letter templates</td>
</tr>
<tr>
<td>The ALOH system shall have the ability to build and run reports</td>
</tr>
<tr>
<td>The ALOH employee shall have the ability to log ALOH donations in to ALOH database.</td>
</tr>
</tbody>
</table>
# WIMSA Business Objectives

## Archive, Library, Oral History:

<table>
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<th>Requirement</th>
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<tbody>
<tr>
<td>The ALOH employee shall have the ability to create or update member or supporter records in the membership management system.</td>
<td></td>
</tr>
<tr>
<td>The ALOH employee shall have the ability to search for ALOH items in ALOH database.</td>
<td></td>
</tr>
<tr>
<td>The ALOH employee shall have the ability to search for supporters and members by their demographic details and/or service data in membership system.</td>
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<tr>
<td>The ALOH system shall have the ability to schedule alerts and reminders</td>
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<tr>
<td>The ALOH system shall securely store ALOH data</td>
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<tr>
<td>The ALOH system shall retain the records as long as needed</td>
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<tr>
<td>The system will allow an admin user to assign roles and access to business users and researchers</td>
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</tbody>
</table>
### WIMSA Business Objectives

| Data Management and Report Builders | • Includes a robust report building functionality that allows for the automation, scheduling, distribution, and ad hoc creation of reports.  
| | • Capability to auto-generate membership correspondence.  
| | • Functionality supporting all areas of the business, including outreach, communication, and public relations. |
| Website | • Includes redesign with seamless integration with CRM and any customized forms via API integration.  
|        | • Includes mobile responsiveness and mobile-ready: The site should be completely responsive and have pages tailored for a mobile audience when needed.  
|        | • Includes Security: Ensure safeguarding any data and sensitive information.  
|        | • Includes Website hosting: long-term hosting of the site.  
|        | • Includes use of Content Management System (CMS): ease of use for WIMSA self maintenance, for small updates and additions to the site.  
|        | • Includes Analytics: Set up with Google Analytics for constant monitoring of various site metrics (visits, time of site, etc.). |