



**Women in Military Service  
For America Memorial (WIMSA)**

**REQUEST FOR INFORMATION (RFI)**

**Membership and Collections  
Management System (MCMS)**

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## I. Disclaimer

This is a Request for Information (RFI) for the purpose of determining potential future capabilities that could support the digital transformation strategy of the Women In Military Service for America Memorial (WIMSA) to modernize and grow in membership, capabilities, and offerings. It does not constitute a Request for Proposals (RFP), a Request for Quote (RFQ), or an indication that WIMSA will contract for any of the items and/or services discussed in this notice. Any formal solicitation that may subsequently be issued will be announced separately. Specific topics of interest are indicated in the following sections of this announcement. WIMSA will not reimburse respondents for any costs incurred in preparation of a response to this announcement. No proposals will be accepted at this time.

## II. Background

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's core mission is to honor past, present and future women who dedicate their lives to defend America, to educate the public on the impact of women in the military, and to be an available and valuable resource to all.

WIMSA's core mission focus areas and the capabilities and resources that enable mission delivery are represented as pillars and critical resources. The three mission pillars are 1) Honoring and Documenting Past, Present and Future Women in the Military, 2) Educating on the Impact of Servicewomen, and 3) Being a valuable resource for all stakeholders, partners, and supporters. These pillars are supported by three critical resources: 1) People, Memorial & Artifacts; 2) Technology and Digital Platforms; and 3) Leadership, Strategic Vision, Management and Operations.

The organization's basic structure consists of four business areas supporting its operations. The WIMSA organizational structure includes personnel supporting membership registration and maintenance, donations processing, memorial operations, sales and marketing, collections archival and artifacts management, library management, and finance.

WIMSA's legacy system is a custom developed 4D graphical database system (<http://www.4d.com>). The 4D database system tracks donations, expenditures, records of women's service, and the memorial register. The application also supports its memorial operations, provides sales and donations management, and maintains the curator collections,

oral history, and library content. WIMSA internal staff also supports the public researcher community utilizing 4D’s query and reporting capabilities to access historical data. The WIMSA 4D system was developed in-house and was implemented utilizing six distinct databases supporting the WIMSA business areas.

Today, WIMSA’s applications run on 4D version 4 of the database and utilizes the following:

Database	4D Foundation, Plugins and Bundles
Register	4D Internetcommands.bundle, 4D Pack.bundle, 4D Write.bundle
Memorial	Foundation shell v2.0.1 of 4D
Sales	Foundations shell v1.1, 4D Open.bundle, 4D Pack.bundle and Mac4DX
Curator	Foundation shell v3.7.1 , 4D Write.bundle and Mac4DX
Oral History	Foundation shell 4.1.4 with 4D Internetcommands.bundle and 4D Write.bundle
Library	Foundation shell 4.1.4 with 4D Internetcommands.bundle and 4D Write.bundle

### III. Purpose

The purpose of this RFI is to conduct market research to obtain Vendor’s perspective, capabilities, and estimated costs of potential solutions. The information resulting from this RFI will help to identify vendors, either individually or through teaming, that are capable of providing a solution for the modernized database and Membership and Collections Management System (MCMS) for WIMSA.

WIMSA has three primary objectives:

1. Given the size and scope of the system capabilities required, WIMSA wants to ascertain what methods, strategies, and best practice approaches vendors suggests for:
  - Implementation Delivery (e.g., Agile, Waterfall)
  - Data Migration, Cleansing, and Validation
  - Data Security
  - Program Management (e.g., PMBOK)
2. Receive a Rough Order of Magnitude (ROM) of the costs associated with the recommended solution. WIMSA, as a non-profit organization, is seeking the most cost effective use of its financial resources to achieve the required systems capabilities and security to support its mission.

3. Receive Vendor feedback on the Draft WIMSA MCMS Request for Proposals (RFP).

#### IV. Summary of Business Objectives and Target Solution

WIMSA is undertaking an effort to modernize its current MCMS that will serve as the launching pad for WIMSA’s enterprise organizational goals. The modernization effort will support WIMSA’s strategic goals to embrace and expand the organization’s footprint, improve use and reuse of its internal data, provide operational efficiencies, target younger generations, and deliver expanded value to a wider group of stakeholders. The goal of the transformation is to implement a modern and stable digital platform that embraces and better supports the organization's history of rich member data while providing operational improvements and stakeholder value.

WIMSA is interested in solutions based on technologies that address current requirements and are also extensible and adaptable. Appendix C provides detailed functional and technical requirements. These requirements and documented processes should support vendors in their response to this RFI. The following provides a high level Capability Overview required of the future system to support all of WIMSA’s major operational business areas:

Business Area	High Level Future System Functionality
Membership and Donor Registration	<ul style="list-style-type: none"> <li>• Includes the CRM for registration management and donation collection of donors and registered members.</li> <li>• Integrates seamlessly with a new redesigned WIMSA website.</li> <li>• Includes capabilities providing the membership and the public with tools for online access for membership registration and management.</li> <li>• Provides Workflow and data validations</li> </ul>
Foundation Operations	<ul style="list-style-type: none"> <li>• Includes the management and reporting of registrations and donations.</li> </ul>
Memorial Operations	<ul style="list-style-type: none"> <li>• Includes the management and reporting of Memorial events, registrations, and donations.</li> <li>• In addition, the Memorial and Event functionality should support and integrate with membership and donor registrations.</li> <li>• Provides Workflow and data validations and edits.</li> </ul>
Accounting and Finance	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Includes API functionality to support financial</li> </ul>

Business Area	High Level Future System Functionality
	transactions integration.
Sales and Gift Shop	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Any gift shop purchases or donations should be tracked on the member's/supporter's account in the membership management system.</li> <li>• The system includes capability to integrate and support on-line sales and marketing and also mailing campaigns with funds receipt-tracking functionality.</li> </ul>
Library, Archive, and Oral History Archive	<ul style="list-style-type: none"> <li>• Includes the management and reporting related to the WIMSA library, collection artifacts archive, and oral history archive.</li> <li>• Also includes a public facing research portal functionality.</li> <li>• 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.</li> </ul>
Data Management and Report Builders	<ul style="list-style-type: none"> <li>• Includes a robust report building functionality that allows for the automation, scheduling, distribution, and ad hoc creation of reports.</li> <li>• Capability to auto-generate membership correspondence.</li> <li>• Functionality supporting all areas of the business, including outreach, communication, and public relations.</li> </ul>
Website	<ul style="list-style-type: none"> <li>• Includes redesign with seamless integration with CRM and any customized forms via API integration.</li> <li>• Includes mobile responsiveness and mobile-ready: The site should be completely responsive and have pages tailored for a mobile audience when needed.</li> <li>• Includes Security: Ensure safeguarding any data and sensitive information.</li> <li>• Includes Website hosting: long-term hosting of the site.</li> <li>• Includes use of Content Management System (CMS): ease of use for WIMSA self maintenance, for small updates and additions to the site.</li> </ul>

Business Area	High Level Future System Functionality
	<ul style="list-style-type: none"> <li>Includes Analytics: Set up with Google Analytics for constant monitoring of various site metrics (visits, time of site, etc.).</li> </ul>

Once implemented, the new MCMS will provide WIMSA with efficiency improvements such as data reuse, workflow automation, and paper reduction in all of the business areas above.

## V. Solution Elements and Technology Landscape

WIMSA anticipates the need for a comprehensive end-to-end solution that is based on a Commercial-off-the-Shelf (COTS) MCMS that includes data management, hosting, data security, and training elements.

The required solution elements are grouped into:

- Integrated web and mobile capabilities
- A flexible and scalable data model
- Robust data and functional integration capability
- Reporting and analytics capabilities

Certain capabilities may not be required for the initial solution but may be required in the evolution of the WIMSA MCMS. WIMSA will use the information obtained from this RFI to consider a phased approach to delivering capability. A brief listing of the elements and capabilities envisioned for each solution element follows.

**Integrated Web & Mobile Capabilities** - Software front ends, specifically those business process areas with external stakeholder facing functions, should support seamless web and mobile capabilities. Mobile member experiences and integrations are key to WIMSA's engagement with wider stakeholder groups. Example Integrated Online Web & Mobile capabilities could include:

- Member Profile Management & Access
- Member/Supporter Donations
- Member/Support Forums
- Events Management & Push
- Member Social Media Integration

**Flexible & Scalable Data Model** - Core to WIMSA's vision and mission is its unique membership database that manages profiles and relationships of both active and retired women in the military as well as supporters and donors. Platforms used to manage member data, history, and profiles must be customizable to meet the current needs but scale to not only support modular development of known functions but accommodate new member/support data, integrations, and future functions.

**Data & Functional Integration Capabilities** - Supporting WIMSA's vision requires integration of information systems with both internal and external systems. The future MCMS platform supporting Platforms supporting WIMSA should support integration capabilities and/or open application programming interfaces (APIs) that can be used to integrate functionality in support of business or stakeholder improvements. Examples may include:

- Internal WIMSA Integrations
- Accounting System Functions - Member/Support Donation Management
- Member Point of Sale Integration
- Member Curation & Library Integration & External Publishing/Access
- Member Forums
- Marketing
- Email
- Mail Merge
- Social Media
- External Integrations
- Military Cemetery Data Integration
- Smithsonian
- Education Platforms & Information Sharing
- Events Management
- 508 Compliance

**Reporting & Analytics** - Key to WIMSA's efforts is the ability to access all of its data for analysis purposes. Tools and platforms should provide at minimum open access to underlying data or internal reporting/warehouse functions that support analysis and reporting for a wide range of management, engagement/marketing, and accounting purposes. Examples include, but are not limited to:

- Membership and Targeted Marketing/Outreach Campaigns
- Historic Analytics
- Donor Activity
- Partner Contributions

**Data Security & Validation** - WIMSA requires a solution based on technologies that will enable secure data access and data exchange with partners, membership, and the public. The system should contain the capability to authenticate and authorize users to access data based on their credentials and privileges associated with user roles. The system shall provide the capability to define, manage, and execute business processes and business rules associated with integrating data sources (e.g., edits, validations, corrections, and controls) and generation of alerts/notifications.

**Technology Platform** - WIMSA anticipates the need for its future solution to be hosted on a secure cloud platform.

## VI. Scope

The scope of the anticipated WIMSA contract will include full lifecycle services required to ensure the program's intended capabilities are met, as defined in the baseline WIMSA Requirements Traceability Matrix (RTM). The Vendor team will be required to work collaboratively with WIMSA Subject Matter Experts (SMEs) for configuration and development efforts, and with WIMSA's Independent Verification and Validation contractor.

The scope of WIMSA engagement activities will include, but are not limited to the following:

- Project Management
- Coordinating Memorandum of Agreements (MOAs) and interface agreements with partner systems
- Review of requirements and development of the Membership and Collections Management Functional Design
- Development of the Solution Architecture
- Technical designs for the system functionality, data integration /aggregation, data management, security, and data governance services
- Development/Configuration and Testing
- Participation in testing of the integrated WIMSA solution
- Deployment planning including training, documentation, and transition to production operations / sustainment

## VII. Requested Information

- a. Describe your firm's solution to providing a system that addresses WIMSA's target solution discussed in Sections IV, V, and VI above and requirements listed in Appendix C. List COTS packages and any integrated COTS solutions or bolt-ons you plan to propose.
- b. Describe the benefits (operational, mission, business, cost), and key attributes of your solution that WIMSA would realize through a successful implementation.
- c. Discuss the architecture of your solution, including application(s), database(s), platform, and hosting.
- d. If not discussed in your response to item a., describe your approach, including information about potential partners or subcontractors, to fulfilling the following anticipated solution elements.
  - i. COTS solution
  - ii. Systems Integration services
  - iii. Data migration/transition
  - iv. Hosting and data storage
  - v. Training on system use
  - vi. Data security

- e. Please describe your software licensing approach (examples: per user, concurrent user, per site, enterprise license). Include any discounts or special pricing available to non-profit organizations.
- f. One of WIMSA’s goals is to increase the efficiency, accuracy, and accessibility of data collection, data searching, and reporting. Considering this goal, please describe the process and tools you would employ to consolidate and migrate existing register and collections data into the new system. Discuss methods and tools you recommend to improve the quality of WIMSA’s data and ensure gaps between the migrated and source data are identified and closed.
- g. Based on the information provided, what period of time would your firm recommend for the implementation and transition period, including migrating data and initiating hosting and data storage?
- h. What type of support would your firm expect from WIMSA staff during the transition period?
- i. What is your firm’s recommendation for implementing role-based access control to provide customized access to different users with differing needs?
- j. What additional usage and statistical information, other than that provided in Appendix A, would your firm need to reduce bidding/performance risks?
- k. Describe performance metrics used in other engagements that apply to the services and solution WIMSA seeks.
- l. What is your firm’s point of view for having a “Canned” vs. “Scenario based” demonstration?
- m. Will your firm have the capability to provide a demonstration and oral presentation?
- n. Provide any mutually beneficial recommendations for WIMSA’s consideration.
- o. Provide any recommendations on the Draft MCMS RFP for WIMSA’s consideration.

**VIII. Rough Order of Magnitude (ROM)**

To assist with planning, WIMSA requests you provide a Rough-Order-of-Magnitude (ROM) cost estimate for implementation. Review the usage data in Appendix A and formulate an estimate based on your recommended approach. Provide this proprietary pricing information in the format shown in Table 1, which itemizes various elements of a recommended solution. Provide pricing for all elements of your recommended solution, even if not exactly reflected in the Table. If your ROM prices are based on scope of work and usage metrics other than those indicated in Appendix A, provide the basis of your estimate.

**Table 1: ROM Format**

Major Solutions Elements	Base Year	OY 1	OY 2
Data Migration/Transition			
Configuration and Development (if applicable)			

System Integration (if applicable)			
Training			
License Costs			
Software Maintenance and Support			
Hosting (if Applicable)			
	\$	\$	\$

## IX. Submission Instructions and Formatting Requirements

Interested firms should **submit an electronic copy of the response to this Request for Information** by **2:00 p.m. EDT on August 23, 2018** in a Microsoft Word or PDF compatible file to: [WIMSA@cgcit.com](mailto:WIMSA@cgcit.com). Responses shall be no more than 15 pages with a minimum font size of 11pt (8pt for tables and figures). Files greater than 15MB in size will not be accepted.

WIMSA will hold an Industry Day on 09 August 2018, 10:00 a.m. at the Women’s Memorial at Arlington National Cemetery, Arlington, VA. Directions to the Memorial can be found on at <https://www.womensmemorial.org>. Interested vendors can register for Industry day by sending your organizations name and participant names to [WIMSA@cgcit.com](mailto:WIMSA@cgcit.com). Organizations may send up to a maximum of 2 participants to the event.

Vendors may submit questions for planning purposes via email to: [WIMSA@cgcit.com](mailto:WIMSA@cgcit.com) by August 10, 2018. To ensure interested parties have the same information, answers to questions received by close of business on August 10, 2018, will be e-mailed by blind copy (bcc:) on August 15 2018, to all vendors who submit questions and to interested parties who register by e-mail to receive this information.

All proprietary information received in response to this RFI will be protected against unauthorized disclosure in accordance with applicable laws, regulations, and WIMSA policies. Responses to this notice will not be returned. Responses must clearly delineate sections that are considered proprietary.

**WIMSA anticipates the following acquisition schedule:**

RFI and Draft RFP Release	Q3 FY18 / Q4 FY18
Industry Day(s)	Q3 FY18 / Q4 FY18
Final RFP Release	Q4 FY18
Vendor Demonstrations	Q4 FY18
Contract Award	Q4 FY18 / Q1 FY19

**WIMSA asks that interested parties supply the following information:**

1. Company information, including U.S. or foreign ownership, headquarters, relevant regional or local offices, and point of contact (POC)
2. Telephone number, mailing address, and email address of POC
3. Company Profile:
  - a) Years in business
  - b) Small and/or Disadvantaged Business
  - c) Predecessor companies and/or mergers/acquisitions within last 5 years
  - d) Number of employees
  - e) Number of employees involved with development and support of product(s) offered
  - f) Major products and service offerings
  - g) Age of product solution(s) being recommended
  - h) Location(s) where software is developed
  - i) Update and upgrade schedule of your core Membership and Collections Management System product with minor and major releases detailed
  - j) Plans for future product enhancements
  - k) Strategic partnerships your company engages in (size, reliability, and maturity)
  - l) Anticipated or in-process acquisitions or mergers
  - m) Experience providing software and services to museums in the District of Columbia metropolitan area
  - n) Any Outstanding legal actions involving your company

4. **References:** Provide at least **two** references for projects with similar requirements, emphasizing systems that have been similarly configured and have been in operation for at least one year. The vendor must include, for each reference, the following information:
  - Name of museum or organization
  - Customer contact name, title, street address, telephone number, and e-mail address
  - Description of services provided and applications installed with version number(s)
  - Implementation date
  - Duration of implementation
  - Number of users accessing system
  - Business results and/or metrics of key process improvements
  - Lessons learned that would be relevant to WIMSA
5. Description of implementation services offered (e.g., project management, implementation strategy, data conversion, system configuration and customization, system interfaces, and development of system outputs).
6. Description of on-going maintenance and support services offered (e.g., hardware and software maintenance, customer support, training, release schedule).
7. Recommended timeline for the WIMSA Engagement Implementation and Deployment.
8. Responses to questions in Section VII.
9. Rough Order of Magnitude cost estimate.

**Contractor Support**

Capital Gateway Consulting LLC Team is supporting the WIMSA Program Management Office (PMO) and will participate in the review of RFI responses. These companies are involved in the development of the WIMSA requirements. Each company and individual employee has signed a non-disclosure agreement with WIMSA.

**Primary Points of Contact:**

WIMSA RFI Points of Contact	
<p><b>Mr. Anthony DeWitt</b>                      Capital Gateway Consulting LLC                      Office: 703-542-4120 or © 202-997-1809                      E-mail: a.dewitt@cgcit.com</p>	<p><b>Mr. John Campbell</b>                      Capital Gateway Consulting LLC                      Office : 703-542-4120 or © 703-200-5646                      E-mail : j.campbell@cgcit.com</p>
<p><b>Ms. Jordan Bolan</b>                      Women In Military Service For America Foundation                      Office : 703-892-7092 EXT 135 or © 863-532-9703                      Email : jbolan@womensmemorial.org</p>	

## Appendix A – Usage Information

Environment	Size	Description
Membership Database	250,000 records	A database containing member data, including demographic, service and transactional information.
Archive Database	25,000 items	A database containing archive data, including artifact descriptions.
Oral History Database	1,140 items	A database containing oral history data, including descriptions of stories, videos, and recordings.
Library Database	1,975 items	A database containing library data, including descriptions of books held in library.

Category	Qualifier	Stats and Versions
Users	Estimated	40
Peak Concurrent Users	Estimated	20
Number User Locations	Current	2
Database	Current/as-is	4D
Programming Language	Current/as-is	4D
Data Storage	2018 est. – 2020 forecast	Scalable

## **Appendix B – WIMSA Policies and Regulations**

WIMSA's security requirements policy is limited in scope. WIMSA's MCMS shall be safeguarded through the use of a mixture of administrative, procedural, physical, communications, computer and personnel security measures that together achieve the protection of information referred to as "Personally Identifiable Information"(PII).

Vendors must demonstrate compliance in securing PII within MCMS and Hosted environment.

## Appendix C – High Level Functional and Technical Requirements

The WIMSA High Level Functional and Technical Requirements are provided as reference material to illustrate functions and technical needs identified by WIMSA for the future of their mission support needs.



WIMSA\_Functional\_a  
nd\_Technical\_Require