December 18, 2020

Attn: Professional administrative and logistics solutions providers

Dear Offeror:

The National Capital Area (NCA) chapter is the only federally focused chapter of the Healthcare Information and Management Systems Society (HIMSS). We are based in the Washington, DC metropolitan area and serve over 1,100 members, who are motivated to improve health information management and drive health information technology (IT) innovation to maximize patient outcomes. Although many of our members live and work around Washington, DC, our diverse membership spreads throughout Maryland, Virginia, and across the nation. Our members represent government contractors, hospitals, managed care organizations, health IT vendors, integrated delivery systems, academia, and non-profit healthcare organizations, as well as government agencies such as the Military Health System, Department of Veterans Affairs, Department of Health and Human Services, and other federal agencies with a healthcare focus.

Our 100% volunteer Board of Directors includes health IT experts, clinicians, retired military officers, business development professionals, and former CEOs drawn from a variety of healthcare-oriented organizations. All of us work towards the common goal of providing our members with access to the latest health IT information to support their goals. Therefore, much of our work involves outreach, development, education, and mentorship. As a small nonprofit organization run by volunteers, we have a lot to do and limited resources—particularly time—to do it all.

We need the support of a highly motivated, dedicated team to support our technical, logistics, and administrative needs. These needs range from website management to onsite event registration (once the pandemic and its restrictions subside) and taking meeting minutes. As you will see in the attached request for proposals (RFP), we are specific about our needs. We are seeking innovative ways to meet and exceed those needs. Social media expertise is strongly desired, excellent writing skills and attention to detail are absolutely required.

The members of the HIMSS NCA Board of Directors will be the only persons viewing the proposals and quotes. We will manage all submitted content and quote information with strict confidentiality.

Sincerely,

Darryl W. Roberts, PhD, MS, RN, FHIMSS, FAAN
President, HIMSS NCA 2020-2021
Administrative, Logistic, & Technology Support Services Request for Proposals
1. Request for Proposal

1.1. Statement of Purpose
The Healthcare Information and Management Systems Society (HIMSS) National Capital Area (NCA) Chapter requires the support of a highly motivated, proactive, and quality-focused contractor to support our technical, logistics, and administrative needs. These needs range from website management to virtual and onsite event registration (once the pandemic and its restrictions subside), marketing, supporting communications (external and internal), and other administrative duties outlined in this RFP. We are seeking a contractor that provides innovative ways to meet and exceed those needs while providing high quality communication representative of the HIMSS NCA Board.

1.2. Background Information
The Healthcare Information and Management Systems Society (HIMSS) National Capital Area (NCA) Chapter is the only federally focused chapter of HIMSS. The HIMSS NCA Chapter is based in the Washington, D.C. metropolitan area. Our chapter currently consists of over 1,000 members who are passionate about health information management and the technologies that drive health information technology innovation. The HIMSS NCA Chapter has a diverse membership spread throughout Maryland, Washington D.C., Virginia, and nationwide. Our members represent hospitals, managed care organizations, vendors, integrated delivery systems, academia, non-profit healthcare organizations, and government agencies, such as the Defense Health Agency, Department of Veterans Affairs, Department of Health and Human Services, and other federal and state agencies with a healthcare focus.

Our 100% volunteer Board of Directors includes health IT experts, clinicians, retired military officers, business development professionals, and former CEOs drawn from a variety of healthcare-oriented organizations. All of us work towards the common goal of providing our members with access to the latest health IT information to support their goals. Therefore, much of our work involves outreach, development, education, and mentorship. As a small nonprofit organization run by volunteers, we have a lot to do and limited resources—particularly time—to do it all.

1.3. Scope of Work
The Scope of Work requires a full-service marketing and communications, event planning and administrative contractor with core competencies in public relations, marketing and event management services for both in-person and virtual event scenarios. Contractor must have social media expertise; managing webinars; handling a variety of professional staff and speakers with differing expectations and deadlines; ability to build trust with Board members, corporate sponsors and government speakers; while achieving and maintaining high quality results and standards by demonstrating excellent writing skills and attention to detail.

1.4. HIMSS NCA Chapter Administrative Support and Responsibilities
General Administrative Tasks.
• Provide professional administration of HIMSS NCA Chapter augmenting the volunteers with professional association management services.
• Manage correspondence, responding to questions or forwarding requests to appropriate Board Member.
Collects Chapter correspondence from the HIMSS-NCA P.O. box on a weekly basis and distributes it to the appropriate Board member.

Coordinate logistics of monthly Board meetings, including collating of agenda items and sending reminders out to Board to submit monthly action item slide updates.

- Preparation of slides for Board meeting
- Send calendar invites to Board members and invited guests
- Develop draft meeting agenda for Chapter President and Secretary three days prior to Board meeting
- Send meeting slides out at least 24 hours before each Board meeting
- Participate on standing meetings and take minutes
- Submit minutes to Secretary for review within one week following Board meeting; submit final minutes to Board within 3 days following approval of Secretary

- Manage a central repository for all HIMSS NCA documents
- Organize and maintain the HIMSS NCA annual calendar
- Draft Annual report for HIMSS NCA Chapter and submit to Secretary for review
- Maintain strict confidentiality and code of ethics for management of passwords, account access and expense management
- Reports to HIMSS NCA Board President and President-Elect
  - Submit Weekly Reports on accomplishments, expenses, upcoming events/action items, challenges and mitigation strategies

Marketing, Communications, Social Media and Website Support.

- Design webinar page for emails and social media ensuring compliance with HIMSS National and HIMSS NCA standards
- Work with Communications Chair to develop a minimum of four draft press releases annually and develop mailings for special events/programs, such as the HIMSS NCA Ugly Sweater Party, Scholarship, Charity, and Mentorship programs
- Identify newsworthy events and present to Board during monthly meetings.
- Upon approval of the Communications Chair, refresh HIMSS NCA homepage to promote events, highlight relevant announcements, and drive member engagement.
- Collaborate with the Programs Chair to provide speaker and sponsor updates for the HIMSS NCA website.

Membership, Sponsorship and Treasurer Support.

- Maintain member and volunteer database
- Pull monthly reports from HIMSS on new Chapter members and send new members welcome letters on behalf of the HIMSS NCA President and Membership Chair
- Work with Sponsorship Chair to prepare and submit Sponsorship packets.
  - Create dedicated sponsor prospectus and commitment form.
  - Send out invoices to Sponsors with a copy to the Board Treasurer
  - Track invoices and provide weekly status updates to the Treasurer
- Process Small Business online sponsorship payment and distribute sponsorship information (i.e. handouts, logos, etc.) to Programs within 24 hours of sponsorship processing.
- Support Sponsorship with Annual sponsors and process payments and distribution of benefits as needed.
- Analyze member attendance for virtual and in-person events and provide a report to the Board on a quarterly basis.
Program Support.

- Support monthly program events (events are held virtually during current COVID-19 pandemic; events will likely be held near the Tyson’s Corner or Arlington areas once in-person events resume).
- Provide program and operations management, registrations, marketing, and sponsor and speaker support in the following areas:
  - Participate on bi-weekly program committee calls
  - Work with Programs Chair to define monthly event milestones
  - Act as the primary Point of Contact for attendees before, during, and after monthly programs
  - Provide weekly updates to Board on event registration status
  - **Post-COVID** - pre-, onsite, and post-event coordination of venue, to include catering and audiovisual requirements
    - Set-up, manage, and staff onsite registration for approximately 150 - 300 attendees
    - Produce and distribute event-specific name badges
    - Distribute any literature or sponsor materials
    - Distribute and collect post-event surveys
    - Post signage for event, as needed
  - **Current State** – for planning/pricing purposes please base your pricing on five (5) months of virtual events, five (5) months of onsite support, and two (2) months of planning and preparation
    - Process virtual registrations
    - Collaborate with Programs Chair to finalize speakers and sponsors at least 3 weeks prior to the meeting
    - Collaborate with Communications Chair to promote event on the HIMSS NCA website and on social media platforms (i.e., LinkedIn, Twitter, and Facebook)
      - Update the event website weekly with any program/speaker changes and provide updates to the Communications Chair for distribution to members
      - Upload past programs to the website within 1 week following the event (as permissions allow)
    - Develop initial draft of webinar introductory slides with sponsor information, announcements and speaker pictures one week prior to the webinar event.
    - Setup and run webinar using platform provided or other entities and their respective platforms (NOTE: we currently partner with G2Xchange to use their platform, but are transitioning to our own platform)
    - Manage monthly programs calendar invites and send out weekly program reminder notices weekly and then the day prior to the event
    - Coordinate invites for preparatory events with speakers and program staff; including following up with speakers’ Executive Assistants (EAs) or schedulers to ensure attendance and slide decks are received as needed.
    - Provide technical support for webinars including uploading registrants, and as needed, setting up the backend of the platform for slides, speaker bios, and other materials.
• Follow up with speakers on bios, slides, etc. weekly, and collaborate with Programs Chair to ensure delivery at least one week prior to the event.
• Update the website within 24 hours of receiving new sponsors, speaker bios, or any other materials relevant to events after receiving details from Programs and Sponsorship Chairs
• Within one week of program events, the past events should be updated with the previous events details.

1.5. Transition Period
For a period of one month, the awarded contractor shall support the transition period between incumbent and awarded contractor. The contractor shall plan for and support the logical and seamless transition of activities and knowledge for all organizational processes, system, technology, and methodologies required to support HIMSS NCA from the incumbent to the new contractor. The contractor shall also perform an assessment of all current requirements, success metrics, quality assurance, website security and performance, and administrative support tasks, as well as provide a transition plan within 14 days of award that demonstrates a clear approach to increase and accelerate support for HIMSS NCA. The measure of success in this objective will be based on evidence of understanding of the current “as-is” state of support, innovations for improving support moving forward, and clearly defined requirements around quality assurance and rapid response to known support needs. Contractor should identify any risks and/or issues encountered during the transition period. The contractor shall develop and implement mitigation strategies for each risk/issue encountered.

During the transition period, contractor shall provide the HIMSS NCA President-Elect with weekly status reports, identifying any challenges or issues, contractor mitigation attempts, and areas in which Board support might ensure a seamless transition.

At the end of the contract period, the contractor will engage in transition, as above, to the incoming contractor. The contractor will relinquish all keys, files, equipment, passwords, points of file access, and other property (real or virtual) paid for and owned by HIMSS NCA to the incoming contractor.

1.6. Term of Contract
The term of this contract shall begin on February 16, 2021 and conclude on February 15, 2022. This is a one-year contract with the option to extend the contract in one-year increments. Options may be exercised on an annual basis by mutual written agreement of the contractor and the HIMSS NCA Board.

1.7. Payments, Incentives, and Penalties
We are requesting that the contractor propose/recommend type of contract, i.e., Time and Materials or Firm Fixed Price.
• Provide rationale for your recommendation, including how you propose to conduct invoicing (for example, biweekly, monthly, or quarterly).
• Provide detailed pricing by Task for all the terms of payment for adequate performance.
• Provide recommended basis for incentives for superior performance and penalties for inadequate performance or lack of compliance and/or client surveys indicate dissatisfaction with event.
1.8. Contractual Terms and Conditions
Attach standard contracting forms, certifications, and assurances. You may include requirements specific to this particular contract.
The proposal must include the name, title, and valid signature (wet ink or electronic signatures are acceptable) of the person(s) authorized to act on behalf of the organization proposing to this solicitation. The offeror must provide a “valid through” date for the proposal.
Once accepted and executed, failure to comply with the contract and/or complete the contract period without the express written consent of the HIMSS NCA Board will result in withholding of any outstanding payments in escrow until the contractor and HIMSS NCA Board reach a mutual resolution. Once awarded, the contractor and HIMSS NCA Board agree to settle all contract-specific disputes that cannot be settled in private negotiation through binding arbitration.

1.9. Requirements for Proposal Preparation
Proposal and quote submission requirements:
• Proposal is limited to five pages, excluding quote.
• Font requirements are:
  ▪ 11-point Times New Roman for textual content with 1-inch margins
  ▪ Use 10-point Arial font for tables, graphics, and figures.
• Cite at least two past performances of similar scope and size with client contact information and references. All past work cited must have been completed in the last three years or currently in progress for at least one year.
• Deliver the proposal and quote in portable document format (pdf) on standard 8½” x 11” sheets for text content and 8½” x 14” (max) sheets for spreadsheet/pricing content. Do not send documents in Word, Excel, or other formats (e.g., GoogleDocs).

1.10. Evaluation and Award Process
• Questions must be submitted to the addressee below by noon, 23 December 2020. Questions must cite the page and section when submitted.
• We will respond to bidders’ questions by December 30, 2020 at 5:00 pm EST. Responses will be posted to the HIMSS NCA Website.
• Proposals are due at noon, EST on 6 January 2021.
• The members of the HIMSS NCA Board of Directors will be the only persons reviewing the proposals and quotes.
• We will manage all submitted content and quote information with strict confidentiality.
• Voting members of the Board will serve as the Selection Committee.
• Proposals shall be evaluated based on the contractors’ ability to meet all the requirements set forth in this RFP. Selection shall be made on Best Value to the HIMSS NCA Chapter.

Submit all questions, proposals and quotes to:
Dr. Darryl W. Roberts, President HIMSS NCA @ dwrsrch@gmail.com

• Successful offeror shall be notified on or before January 15, 2021 at 5:00 pm.
• A Transition Period of four weeks will occur from January 16, 2021 – February 15, 2021