

Request for Proposals

Purpose

The purpose of this project is to develop a replacement for the Oregon Shores Conservation Coalition (generally abbreviated to “Oregon Shores”) public website (www.oregonshores.org) and to incorporate into a secure area of the website a new data system for managing the organization’s member, volunteer, and donor information, along with a secure workspace for document sharing, internal calendars and schedules, and other tools for staff, board members, and key volunteers.

Overview of Oregon Shores

The Oregon Shores Conservation Coalition was founded in 1971 to protect the public interest in Oregon’s beaches created by the Beach Bill, and became a 501 (c) (3) non-profit in 1991. The organization’s mission soon broadened to encompass an integrated approach to conservation of the entire coastal region, from the crest of the Coast Range to the edge of the continental shelf.

Our mission statement: *“In Oregon, the beaches belong to the people. As part of Oregon’s tradition of environmental stewardship, the Oregon Shores Conservation Coalition serves as a guardian of the public interest for our coastal region, dedicated to preserving the natural communities, ecosystems and landscapes of the Oregon coast while conserving the public’s access. We pursue these goals through education, advocacy, and engaging citizens to actively keep watch over and defend the Oregon coast.”*

Oregon Shores is a comprehensive regional conservation organization. We address the full range of conservation concerns—land use, water quality, endangered species, shoreline management, marine conservation, and climate change impacts, among others—and we attempt to integrate our actions in all these areas into a coherent strategy for protecting the coastal region’s ecology. We often collaborate with other regional, local, or national groups on particular coastal issues. Our long-range goals include building and maintaining a broad and deep movement for coastal conservation, developing CoastWatch as a model program for hands-on citizen engagement with the coastal and marine environment; moving beyond reactive land use planning work (responding to development threats) to creation of a proactive strategy for bringing land use and water quality laws to bear on protection of coastal watersheds; providing leadership for adaptive planning for climate change; and supporting a sustainable network of marine reserves and protected areas that will genuinely meet the need for protecting Oregon’s nearshore ecosystems.

Oregon Shores now has about 900 members and four main programs: CoastWatch, Land Use, Ocean, and Climate. These programs, which each have a “home page” on our site in addition to the overall home page, are described briefly below:

Land Use Program. During the organization’s first 25 years, the emphasis was on our Land Use program and advocacy to assure that land use, endangered species, and water quality laws were employed to their fullest effect to protect coastal resources. Many important habitat areas remain undeveloped thanks to our efforts extending over four decades, most recently in partnership with the Crag Law Center through our Coastal Law Project.

CoastWatch, through which volunteers adopt and monitor one-mile segments of the shoreline, was founded in 1993 and now has more than 800 citizen “mile adopters.” These volunteers participate in “citizen science” projects, contributing data to our own database of coastal observations and also to other research projects sponsored by universities, government agencies, and other NGOs. We hope to dramatically increase the citizen science component of our operations over the next few years, which will require enhanced database and web integration capacity. CoastWatch mile

adopters also monitor the coast for illegal or inappropriate development activities or other issues that may be addressed by our Land Use program. As a free outreach program that enables us to work with many segments of the coastal community, CoastWatch doesn't require that volunteers become Oregon Shores members, or vice versa – so we have two major, somewhat overlapping classes of members: Oregon Shores members (approximately 900) and CoastWatch volunteers (approximately 800; about half of these are also Oregon Shores members).

The **Ocean Program**, founded nearly a decade ago, played a significant role in the campaign to create Oregon's new system of offshore marine reserves. (We co-founded Oregon Ocean, the coalition that began the campaign, and worked extensively with the successor Our Ocean coalition, which led the campaign to a successful conclusion.) Many of our CoastWatch citizen science efforts are intimately linked to supporting the new marine reserves and to extending our ocean conservation efforts.

Our **Climate Program**, founded in 2009, reflects the realization that climate change will affect every aspect of our work. The Climate Program has completed a pilot project on adaptive planning for climate change, compiled a set of white papers on scientific and legal aspects of climate change adaptation on the Oregon coast, and is currently working on a project that will address the need to anticipate sea level rise in long-range planning on the coast.

Until 2005 Oregon Shores was an all-volunteer, board-led organization, sometimes paying modest stipends for assistance with CoastWatch volunteer activities or for legal assistance with land use cases. Oregon Shores now has two employees (an Executive Director and a Volunteer Coordinator for the CoastWatch program), an active 10-member board, and an extensive network of volunteers, in addition to regularly hiring contractors for special projects. We anticipate hiring more staff members over the coming years.

Project Background

The current Oregon Shores website is at www.oregonshores.org. It is structured around a main page and four main subsections that are based on our four major programs: CoastWatch, Land Use, Ocean, and Climate. Each of these five main pages displays articles about upcoming events, coastal conservation news and issues, and urgent conservation-related alerts, some of which may appear on multiple pages (for example, an alert about dangerous tsunami debris washing up on our beaches might appear on the both the home page and the main pages for the Ocean and CoastWatch programs). The site is currently very text-heavy, partly by design (we like an information-rich site) and partly because it is old and the design was optimized for coastal users, many of whom still had low-bandwidth internet access when the site was built in 2005.

The site is dynamically generated by a content management system with many features that are similar to typical CMS systems available today – such as a secure area in which those with log-in credentials can create and publish articles on the site of several types (news, events, alerts), including embedded images and links to documents. This site was created entirely from scratch by a developer in 2005, using PHP/MySQL. It includes some features that are unique, most notably a database and interface through which hundreds of volunteers are able to contribute structured observations of the Oregon coastline (“mile reports” uploaded by CoastWatchers who adopt specific sections (miles) of the Oregon coast. There are a number of special features related to the CoastWatch section of the site that involve displaying maps and related information for the Oregon Coast as a whole and by mile-long segments. These features will be replicated in some form – perhaps with more modern geographic information system (GIS) tools – and the user-generated data system will be updated by adding and subtracting fields and ensuring the flexibility to continue updating the database and the web interface in the future for new citizen science projects.

This site will be used by many different kinds of users, each of which will need different permissions to access and use different sections and tools within the site. Replicating the existing unique systems will require a relatively flexible and extensible CMS. It is anticipated that Drupal or a similarly flexible and powerful CMS will be used, in part to ensure access to competent programmers who can help maintain the site for many years to come.

Proposers are encouraged to schedule a meeting with an Oregon Shores representative to walk through the features of the current website and gain clarity on what is needed for this project.

In addition to developing a new public website, a second, related project objective is to design and implement an entirely new data system for managing contact information and other data related to members, volunteers, and donors (similar to a customer relations management or CRM system, but in the non-profit world sometimes called donor relations management, association management software, etc.). Our current system is very archaic and fragmented – essentially an array of spreadsheets and databases, some on individual computers and some in online systems, including listservs and other email newsletter mailing lists, that are all manually updated in their silos. An additional problem is that recording of cash and checks (for dues, donations, products, workshops) is duplicated by different individuals in different systems. All these lists and systems should be integrated into a single online system, available to those with accounts and passwords, built into the back end of the website so that staff or others who log in to the site may also have access to these tools as well as website authoring and calendar tools, etc.

This is a key project for a small non-profit organization, so we are seeking your best service at the lowest price you can offer. We do not have a lot of funding; in fact we need this improved site as a platform for fundraising. We may have to engage in a special fundraising campaign over the coming months in order to support this project – so please consider this in your response.

Tasks/Deliverables

It is likely that funding for this project will be secured in phases, so it will be important to set out the tasks in a logical order and produce budget estimates for each phase. What follows is an attempt to define tasks and deliverables in this way, but proposers are free to suggest a different way of organizing the project into phases or chunks.

Task 1. Project planning

- Work with the Oregon Shores team to ensure that a complete specification of our needs is agreed upon, for both the public website and the secure area that is used for website management and authoring, staff and volunteer private work areas, and the CRM database.
- Refine this list of tasks and related timelines and budgets as appropriate.
- Investigate options as needed to ensure that all the envisioned website structures, tools, features, and underlying software will work together smoothly for the purposes specified.

Task 2. Develop and implement a new CRM system

- Help us choose a CRM system that will fit as seamlessly and elegantly as possible into the password-protected portion of the new website.
- Install and customize this CRM software to meet our requirements. Most likely this will mean first establishing a shell for the website, using Drupal or a similar CMS, then installing a CRM designed for non-profit organizations and designed to work well with that CMS – for example, CiviCRM or RedHen CRM. This will need to be done on a secure development server, with a plan for moving it eventually to replace our current website (host to be determined).

- Import data from our existing databases and spreadsheets. This will no doubt result in a mess, since we have several lists with slightly differing formats and content, and each has some quirks that will need to be ironed out. We expect that the contractor will make reasonable efforts to automate this import as efficiently and accurately as possible, but we understand that some time-consuming labor will be needed to go through individual records, reconcile duplicates, move data into the correct fields, correct errors, add missing data, etc. Our staff and volunteers will be available to do this kind of grunt work, but we want to automate as much as possible first during the importation of data; then we will need a working database environment in which to clean up these kinds of things.

Task 3. Develop new CMS-driven website

- Replicate the core features of our current website but with some planned improvements and some flexibility in how specific features are implemented. Key elements include:
 - the system for publishing articles on the public website, including the ability to display articles on multiple pages within the site in a very flexible manner, controlling the position of each article on the page and whether the entire article or an excerpt or summary is displayed, associated images and links, etc.
 - one or more calendaring systems that can display events in flexible ways on various pages, including both public pages for public events and password-protected staff pages with private calendar information
 - our map-based system for displaying information about each mile of the Oregon coast, including a database and interface that allows CoastWatch volunteers (with appropriate credentials) to contribute records of observations of “their” mile of coastline (including images, latitude and longitude information, and many other kinds of data), tools for editors to review and publish these newly contributed records, and tools for members or the general public to search, browse, and view these records.
 - an enhanced and low-cost system for monetary transactions, integrated with the CRM system: processing new memberships and membership renewals (dues), accepting donations, processing event registrations, processing purchases of books, cards, clothing, and other merchandise. We currently do this using the Network for Good service, but would like to move to a system that is fully integrated and branded within our site and that doesn’t incur high fees for processing. There should be an easy way of exporting financial transaction data for use in our financial bookkeeping and accounting system.
 - an enhanced system for creating and sending email newsletters. We currently do this through Constant Contact, but would like to move to a system that is fully integrated and branded within our site.
- Implement a new navigation system. Currently, navigation is accomplished through a left-side menu that changes according to where you are on the website. This will be replaced with a more modern, minimalist menu bar across the top of the site, with drop-down submenus, that remains constant across the site (and which offers some additional menu options for those who are logged in to the site, according to their individual permissions to access various secure areas).
- In general, we wish to continue with an information-rich site, providing a great deal of news and analysis and background related to coastal conservation issues – similar in many ways to a newspaper site. However, we wish to enhance the visual attractiveness of the site with more use of photos and video, including a section where user-contributed photographs can be displayed, browsed, and searched.

- Many non-profit organizations are moving to systems that allow a great deal of detailed tracking of user interactions. For example, if a user clicks on a link in an email, or registers for an event, this information can be tracked and associated with their record in the CRM system, and even used to generate custom content or email communication with them. We would like to move in this direction as much as we can, though it is not a top priority; if it is relatively inexpensive to add this functionality we would like to do so.
- We currently have very little social media integration; this must be improved, so that users of the site can easily share our content using their preferred social media tools.
- Develop and share a prototype site; work with Oregon Shores staff and board members to review and iteratively refine the prototype until it is ready (in terms of structure, design, and functionality) to fully replace our current site.

Task 4. Data migration

- Work with Oregon Shores staff and board members to import data from the old site into the new site as efficiently and effectively as possible. There are two main data sets to consider: the CoastWatch observations (roughly 4800 records, all of which we would like to preserve if possible) and previously published articles and other content (roughly 1300 records, some of which we would like to preserve).
- Develop the most efficient and accurate way of porting these records into the new site so they are searchable and displayable just as are newly authored CoastWatch observations or news/alerts/events articles, white papers, or other content. As noted above in regard to records in the CRM, we realize that it may not be possible to fully automate this. If it is exceedingly messy, we may have to limit the number of records that are imported, or do a lot of manual scraping of data from the old database into the new one. We can provide labor for such brute force methods, but we expect the contractor to make a reasonable effort to automate the import of these records, and to provide a working environment in which we can efficiently correct errors, reformat records as necessary, add needed information to old records so they work properly in the new system, etc.
- Although we hope to avoid this, it may be necessary to get the new site up and running so that newly generated CoastWatch observations and news articles are created in the new system, while legacy data is maintained for some months in the old system. This would involve installing the new system at our main URL, but moving the old system to a secondary URL, which could be complicated. This would allow more time to move legacy data into the new system if needed, or as a worst case scenario, the older data would be permanently housed in the legacy system, with links as appropriate from the new site.

Task 5. Go live with new site

Once the new site is fully designed and functioning and as much legacy data as possible has been imported and everything is fully tested, it should be moved to the URL www.oregonshores.org and take over as our public site. We would like to find a low-cost, high-reliability, secure and well maintained hosting service, preferably located in Oregon or the Pacific Northwest, to replace our current hosting service.

Task 6. Ongoing maintenance, upgrades, and strategic support

We expect to be able to handle daily and weekly operations ourselves, i.e. adding new content to the public and secure areas of the website, maintaining member and donor records in the CRM, and hopefully adding new fields as needed to the CRM and CoastWatch databases and related online forms. However, we would like to have an ongoing relationship with the contractor for more advanced maintenance, upgrades or additions, security and feature updates to the server and the CMS, and support for strategic technology planning as needed. This may include tasks such as: assistance with developing specifications for grant proposals to support the site; guidance on mobile integration and mobile app development; and scaling up of the website for additional citizen-science protocols (new user-contributed data and new ways of displaying data on maps, in searchable databases, etc.)

Timeline/Period of Performance

We would like this to be done yesterday. If this is not possible, we hope that the following schedule can be maintained, though we solicit your ideas on this as part of your response. Some stages of this project may be delayed pending project-specific fund-raising. Elements of the accepted RFP may be included in fund-raising and grant-writing campaigns. We hope that the vendor will also help us find funding opportunities and provide support/advice for our application for matching funds, citizen-science support, and non-profit technology grants.

April 24, 2015	Deadline for preliminary proposals (optional, if you would like to receive feedback on a preliminary proposal, then revise it to produce a final version.
May 1, 2015	Deadline for final proposals
May 6, 2015	Review committee prepares recommendation(s) for Board decision on May 9
May 9, 2015	Oregon Shores board meeting to review proposals and pricing
May 11, 2015	Contract awarded
May 11 or 12	Initial planning and specifications meeting
May 28, 2015	Task 1 completed (followed by ongoing adjustments as needed)
June 11, 2015	Task 2 completed (followed by ongoing adjustments as needed)
June 24, 2015	Task 3 prototype site completed (after several rounds of feedback and revision of early versions, we expect a fully designed and functioning shell website to be available for review by our board at this point, with at least some content present to demonstrate how the site will look, feel, and function.
June 27, 2015	Oregon Shores board meeting to review website design and function, CRM design and function, all progress to date.
July 24, 2015	Task 4 complete in the sense that contractor has completed data migration to the point that is feasible, efficient, and cost-effective, and provided an interface that facilitates completion of data migration by Oregon Shores staff and volunteers.
August 7, 2015	Launch of new site (Task 5)
August 26, 2015	Establish ongoing contract for maintenance, upgrades, security updates.

Proposal Instructions

Please direct all questions, inquiries and proposals to:

Michael Coe conservation@cedarlakeresearch.com

Michael will be happy to schedule a phone call, web conference, or in-person meeting to walk through the current site and discuss all aspects of this RFP prior to awarding a contract; he will then be available for regular meetings, review of progress, and feedback during the contract period.

The deadline for final proposals is May 1, 2015. If you would like to submit a preliminary proposal for feedback and then submit a revised proposal, please be sure to submit your preliminary proposal by April 24, 2015. Proposals should include the following:

- A. Overview of your recommended approach, including any recommended changes to the structure, timeline, or other aspects of this RFP, and the platforms, software systems, and other tools you recommend.
- B. Cost proposal, including a total and separate amounts structured by the Tasks above.
- C. Brief overview of the specific personnel who would work on the project and their relevant background and experience
- D. Brief overview of the experience of your firm (and the individuals you would assign to the project) in doing projects similar to this one, including links to similar sites you've developed.

It is not our intention to waste a lot of your time on extensive proposal writing; feel free to be concise and to the point, using bullet points, outlines, or other short formats as you like. We are most interested in the quality of your planning and proposed approach, your ability to deliver a quality project on time, and affordability.

Additional Information

Listed below are some notes from an earlier document about our priorities for site functionality, organized according to the needs of different user groups. These are somewhat beyond what is typical for a non-profit or specifically for an environmental non-profit, so we need a CMS/CRM system that is flexible and extensible, that can accommodate many different classes of users with different levels of access and permissions, yet is pretty easy for everyone to use.

Staff and Board:

- Communicate news, alerts, and upcoming events relevant to coastal conservation to members and the public.
- Communicate brand, mission and activities to donors, foundations, funders.
- Communicate white papers, position papers, background information on key coastal conservation issues.
- Solicit online donations, memberships, products purchases, workshops registrations, etc.
- Ability to easily post our content to their social media networks using standard 1-click tools .
- Log in to gain access to secure areas for internal shared document repository, internal calendar of meetings and events, committee workspaces, etc.
- For some board members, log in provides access to post content to the public website .

- Access to shared member/donor database, list serve/email list tools, electronic newsletter publishing tools. A single web-accessible but secure database that can be accessed by staff and board members, with some allowed to edit records and/or add fields. This would ideally integrate all data about individual members/donors/volunteers into one database so when a staff or board member is talking to them we know how long they've been a member, their donation history, whether they have volunteered or participated in events, etc.
- Ability to easily send email announcements or email newsletters to entire membership or subgroups.
- Many organizations like ours provide automated ways that members can send email to their legislators, the governor, agency administrators, etc., and this behavior is also preserved in their database record. We haven't done a lot of this but this capacity would be good to have, we would likely use it if we had it. Many similar organizations seem to use Salsa Labs services for much of the functionality described here (along with donations).
- It is the Treasurer's dream to interface all donor/member-related financial transactions with our accounting system (currently, QuickBooks), thus eliminating any need for duplicate entries of dues, donations and other income. If this is too ambitious, we at least want to move toward this by creating the most efficient and accurate system possible for tracking financial transactions.

Oregon Shores members, CoastWatch Members

- Access to rich stream of news, current events, and detailed background information about various issues related to coastal conservation (e.g., ecology and science of coastal and near-shore ocean areas; land use, legal, legislative and regulatory issues related to key conservation issues; impacts of ocean acidification, sea level rise, and other effects of global warming; promising or threatening development proposals; related events sponsored by Oregon Shores or other organizations, etc.).
- For newcomers to Oregon or others who want to learn about our coast, access to rich repository of information on the geography and natural history of the Oregon coast, including detailed topographic maps of each mile of the coast, recommended guidebooks and online resources, etc.
- Ability to browse the Mile Reports database providing data and photographs gathered by CoastWatchers on each mile of the coast.
- Ability to join, renew membership, make gifts, buy products, make donations, register for workshops online.
- Members receive email invitations to special CoastWatch events and news updates relevant to their county or other specific locale.
- Log in to gain access to contribute data and photos into the database of "Mile Reports". In future this is likely to be expanded so that all members can contribute mile reports containing a core set of data, but in addition, some members will also be trained to help with specific citizen science data collection protocols, so that when they log in, in addition to the main Mile Report form they also have access to additional data entry forms for particular scientific studies. I.e, we want a modular database which will present different sets of forms to different users when they log in, depending on which projects they are participating in. Kind of like how when you log into to a university's online course home page, you are presented with access to the various classes you are taking, which varies for each student.

- Key volunteers may also be granted additional permissions on the website e.g. as content authors or editors, listerv managers, etc. so there should be a lot of flexibility in granting different permissions to people with differing levels of access to the back end of the site.
- We have recently begun a Flickr site that volunteers can use to contribute photos that may be used in our publications or on our website. Ideally this would also be integrated into our site somehow.
- Ability for website users to easily share our content with their social media networks using standard 1-click tools

General Public / Potential Members, Donors, Funders

A mix of the things already listed above but with an emphasis on quickly and easily gaining an introductory look at these topics and then easily moving into more thorough, detailed information if they wish:

- Quick access to overviews of our mission, upcoming events, hot topics in coastal conservation in which they might want to engage
- Access to rich stream of news, current events, and detailed background information about various issues related to coastal conservation. Our current site is too overwhelming with detail on first impression; we need to make the top-level information very easy to find and navigate, and more visually attractive, with links to more detailed layers if people want to drill down and learn more.
- For newcomers to Oregon or others who want to learn about our coast, the site provides access to rich repository of information on the geography and natural history of the Oregon coast, including detailed topographic maps of each mile of the coast, recommended guidebooks and online resources, etc.
- For those who want to understand our coast and our programs better, ability to browse the Mile Reports database providing data and photographs gathered by CoastWatchers on each mile of the coast
- Ability to join, renew membership, make gifts, buy products, make donations, register for workshops online
- Ability to easily post our content to their social media networks using standard 1-click tools