USA COOPERATIVE YOUTH COUNCIL
REQUEST FOR PROPOSALS
Database & Web Development 2014/15: CiviCRM Implemenation

PRIMARY CONTACT
NAME: Emily M Lippold Cheney, USACYC Board Director
EMAIL: emily@ahoy.coop & info@youth.coop
PHONE: 515.442.0749

ORGANIZATIONAL BACKGROUND

USACYC is a national, cross-sector council of youth (age 17-30) cooperators and their allies. USACYC facilitates and strengthens the engagement and influence of youth in national and international cooperative movements through participation, opportunity, and identity. Please visit www.facebook/com/USACYC or www.youth.coop (in development) for more information. USACYC is organized as a common equity cooperative (i.e. non-stock, non-distributive, non-profit) and is considered federally tax exempt.

- Organizing work for USACYC began in late 2011, and we were founded in October of 2012.
- We have been spending the last 2 years focused on building up our internal policies and practices – development a national organization is tough to do over the phone!
- We received our first grant monies around 1.5 years ago and $22,000 is the most we've ever had “in the bank” at any given time.
- We have held three national gatherings of cooperative youth in as many years, have launched many of our programs for the first time this year, and hired our first contractors in the last couple months.
- A great deal of our potential success and growth is contingent upon a strong online presence, given the national scope of our membership and work.
- You can read more about our organization and “what we do” in this report: https://docs.google.com/document/d/1180n4sxv9SdGAKj0TgmRRD7hM51AKmf6Jdz-XrqUoTk/edit?usp=sharing

USACYC is seeking to contract with an individual or group in the cooperative technology sector to provide **CiviCRM Development Services,** with the potential for a longer term maintenance contract.

SUMMARY OF PROJECT
USACYC has a Drupal 7 site (youth.coop) that a developer created for us during the Summer of 2014, which was envisioned to include Red Hen CRM. We elected to pursue Red Hen after being urged by several Drupal developers to do so, as it being “native” was seen to be ideal. The contract framed the work as a “learning project” for the contracted developer, but the project ended up being a bit out of reach of the developer's capacity. Additionally, as our work wore on, we discovered that Red Hen does not suit our needs and was the wrong decision to make. As a result of all this, we have the beginnings of a site with a fair amount of Red Hen and related modules that need to be uninstalled. Moving forward, we have decided on implementing CiviCRM in lieu of Red Hen and to solicit some additional theming support (covered in a separate RFP) to make our site fully usable. This RFP covers the implementation of CIviCRM for USACYC.

SOLUTION REQUIREMENTS

Organizational Goals for the Project:

- Easily manage online membership application and initial dues payment
  - Coordinate membership application with the set-up of a Drupal site account with minimal

    permission to interact with the front-end of the site (e.g. forum, resource library)
- Easily manage and track online/automatic monthly and annual dues invoicing and payment
- Easily manage and track online donations
- Easily manage online event registrations
    - Cost and no cost events → different fee levels, discount codes
- Easily manage and track email signups and send email blasts
    - Email blasts to different groups (e.g. members, non-members, specific member types
- Manage and track member and supporter data
    - Make data searchable, exportable, and reportable

User Profiles:
- Staff: People paid to manage the organization, run programs/events, and provide member services
- Members: People in good standing through the timely payment of annual dues (Types: Youth, Bridge, Solidarity)
- Donors: Individuals and organization who have or may donate to USACYC
- Event Registrants: People intending to attend our events
- Email List Subscribers: People signed up for our various listservs (both members and non-members)

Supported User Stories:
Ideally, the respective user groups would each have the following capabilities:

Staff
- Tracking information about individual and organization members according to membership type
    - Youth = individual, Bridge = Individual, Solidarity = Individual or Organization
        - Individual:
            - Contact Information
                - Name, address (post optional, city/state required), phone, email
                - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
            - Birthday
            - Organizational Affiliations & Titles (optional)
            - Email Subscriptions
            - Event attendance history
            - Membership timeline & dues payment history
            - Scholarship & stipend receipt history
            - Skills or areas of expertise
                - Areas of interest
            - Governance roles (e.g. Working Group membership, Board status)
            - Misc. notes
        - Organization:
            - Contact Information
                - Name, address (post optional, city/state required), phone, email
                - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
            - Liaison Contact Information
            - Role of youth organization
            - Organizational Affiliations & Titles (optional)
            - Email Subscriptions
            - Event attendance history
            - Membership timeline & dues payment history

        - Partnership or sponsorship history
        - Misc. notes
- Tracking information about individual and organization non-member stakeholders
    - Individual:
        - Role in USACYC (e.g. donor, international ally)
        - Contact Information
            - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
        - Birthday
        - Organizational Affiliations & Titles (optional)
            - Email Subscriptions
        - Event attendance history
        - Payment or donation history
        - Misc. notes
    - Organization:
        - Role in USACYC (e.g. donor, international ally)
        - Contact Information
            - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
        - Role of youth organization
        - Organizational Affiliations & Titles (optional)
            - Email Subscriptions
        - Event attendance history
        - Payment or donation history
        - Misc. notes
- Create online event and program registration pages and manage the registration process
    - Basic event info: event date/time, location, event description, open registration dates
    - Group and individual registration options
    - Registration payment options: paid/free events, tiered prices (i.e. sliding scale), discount codes
    - Other: capacity to customize form elements (e.g. indicate dietary preferences, lodging preferences, essay section for scholarships)
        - Scholarship/stipend: could have separate application for this that incorporates with event registration
- Track event and program registrant information
    - Basic contact info: see "Individual: tracking info"
    - Status: payment or due amount, method of payment, scholarship/stipend application status or details
- Ability to create reports and run searches on all contact and event information

Members

- Access to membership directory of basic contact information (e.g. name, town, organization)
    - Ability to edit own membership details
- Access to "members-only" sections of the website

Donors

- Visit a webpage that allows them to make a one-time or recurring credit card donation
    - Page asks for -
        - Name, organization, email, phone, website, amount; and
        - donor questions -
            - "Why are you donating?,"
            - "Would you like to be contacted about formalizing your supporting role with USACYC though an organizational partnership or sponsorship for one or more of USACYC's programs?" (including a link to a page describing partnerships).

Event Registrants

- View upcoming events
- Register for a free or paid upcoming event
- Be automatically added to a listserv for an event for which they have registered
    - Access listserv archives
- View past event details

Email List Subscribers

- Sign up for one of more mailing lists on youth.coop that are linked with our existing listservs

Deliverable Specifications:
The following are needed to achieve the solutions and capacities detailed above -

0. Drupal 7 Security Fix
Our current Drupal site has not been touched or updated following the recent news (Oct 2014) about a security hole in Drupal 7 sites – configure or coordinator with our general Drupal/theming contractor to fix this.

1. CiviCRM installation and basic configuration
Install CiviCRM in our existing Electric Embers web hosting account with our existing Drupal site. Configure basic settings. Enable any components needed (at a minimum, we expect to need CiviEvent, CiviContribute, CiviMail, CiviMember, CiviReport, CiviCampaign).

2. Customizations
Please view **Appendix: USACYC Customizations** for more detail and **Appendix: USACYC Processes** for greater context. We would like the CiviCRM user interface configured to hide any form fields/sections that we do not need.

3. CiviMember
Please view **Appendix: USACYC Customizations** and **Appendix: USACYC Processes** "MEMBER MANAGEMENT" for more detail.

4. CiviContribute
Configure CiviContribute and set up an online donation form that we can link to from our Drupal website. See the **"FIELDS" tab within Appendix: USACYC Customizations.**

5. CiviEvent
Configure CiviEvent to allow us to set up online event registration pages that we can link to from our Drupal website. See the **"FIELDS" tab within Appendix: USACYC Customizations.** Expose basic information about events (title, description, date/time, address, CiviCRM event page URL) to Drupal Views so that event listings can be created on the website using Views.

6. CiviMail
Configure CiviMail so that we can send email using the CiviSMTP service. Set up a general email signup forms that we can link to from our Drupal website. See the **"FIELDS" tab within Appendix: USACYC Customizations.**

7. CiviReport
Create the reports listed on the **"REPORTS" tab within Appendix: USACYC Customizations.**

8. TBD → CiviCampaign
Unsure about utility or need for USACYC – perhaps for membership drives? Advisement is much appreciated.

9. Training
Train the USACYC staff and primary volunteers on use of CiviCRM. Topics needed include:

- Basics for Individuals and Organizations
  - Entering Individuals, Organizations
  - Merging Individuals, Organizations
  - Best practices for data entry and hygiene (address formats, etc.)
- Managing Memberships
  - Confirming applications
  - Processing/confirming dues payments
- Managing Donations
  - Entering a contribution from an individual or an organization
  - Viewing/managing incoming online donations
  - Reporting on donations, acknowledgments
- Creating events
  - Configuring event options/details, registration fees, discount codes, free events, workshop signups
  - Viewing/managing online event registrations and payments, entering offline registrations
  - Reporting on events, attendees, workshop signups, payment status/fee waivers
- Creating email campaigns
  - Searching/filtering for Contacts and adding them to an email blast
  - Creating direct mail campaigns
  - Using Household reports to create a list of postal mailing addresses
- Advanced reporting/searches
  - Walk us through a few of the more complicated reports on the “REPORTS” tab of “Appendix: USACYC Customizations” so we can understand how to build or modify these reports ourselves
- Other admin tasks
  - Adding/managing new user accounts (for staff members who need access to the CRM)
  - Adding more option values to standard/custom fields (for example, if we need to add a new Event Participant Role or Organization Type)
  - Adding custom fields (for example, if we need to add a new field to Individual)
- Data Integration & Migration
  - To be done in-house, but staff will need to be trained to do so with one indidvidual and one organization contact type example.

10. Continued Support
We would prefer to engage a vendor that can provide ongoing support after the CiviCRM launch in case we have questions or issues with the software. If you can provide information about your available support services and your support contract pricing and structure (monthly retainer, hourly, etc.), this would be helpful for us.

TIMELINE & BUDGET
<u>Desired Launch:</u> May 2015 (negotiable), with CiviMember ASAP
<u>Available budget:</u> Our calculations will not include #10 and/or #8, depending, above. We are looking to hear proposals from groups before setting our budget, is this is a core area of our work and we would like a better understanding of what exactly is possible for what amount of money so we can prioritize features and capabilities. For reference, USA Cooperative Youth Council was a 5k common equity non-profit cooperative in 2013, 25k in 2014, and – depending on our grant applications – a 50k in 2015.

Actual fees will be based on tracking and submittal of contractor hours dedicated to performing the approved services and receipts for associated expenses. Regular invoices (monthly) must be submitted for processing and progress review, unless a project-based compensation arrangement is proposed. The contract terms will include a clause allowing termination of the contract for non-performance, given a 30-day written notice of dissatisfaction and opportunity to correct the situation.

SUBMISSION INFORMATION

Please submit your response by EOB on Friday, January 30th, 2015. Your submission must include:

- An outline of the action steps to be taken toward each general duty outlined within the scope of work, including timelines as appropriate,
- An estimate of all associated expenses (beyond labor) anticipated in correlation with performing the requested services,
- An hourly billable rate or other billing proposal,
    - Estimates for deliverables #1-9 as separate line items (if possible)
- A description of the capabilities the contractor and/or its representatives relative to performing the general duties of the scope of work, as well as commitment to cooperative work,
    - At least two client references for projects of similar scope and budget
- If you are a youth-ally and do not identify as a youth, please share your commitment to allyship, and
- Proposals submitted by groups should also include a designated lead representative responsible for reporting to the USACYC liaison.

All questions submitted by Friday, January 16th, 2015 will be answered in one email to interested parties by EOB on Monday, January 19th, 2015. All other questions submitted after the 16th will be responded to as we are able.

Submit all questions and proposals via email to USACYC at info@youth.coop.

USACYC seeks to make a decision by mid-January and will let all those submitting proposals know of their decision when it has been made.

APPENDIX

USACYC CUSTOMIZATIONS

https://docs.google.com/spreadsheet/ccc?key=0ApPyx9g3K1JFdHJvQ1RvTS10Y080LWlJeU5odXlXQmc#gid=7

USACYC PROCESSES

MEMBER MANAGEMENT: Individuals (Youth, Bridge, Solidarity) & Organizations (Solidarity)
Collect Info (Ind)

- Contact Info
  - Name, address (post optional, city/state required), phone, email
  - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
  - Birthday (membership type changes accordingly as members age)
  - Organization affiliations and titles (current → historical nice, but not vital)
  - Membership status (current and historical)
    - Date joined, dues history, date lapsed, etc.
- Email subscriptions
- Participation status (current and historical)
  - Governance: Working Groups, Board of Directors, Advisory, Mentorship
  - Event attendance and program participation
  - Donor history
- Contact Preferences (email, post, phone, do-not-solicit)

Collect Info (Org)

- Contact Info
  - Name, address, phone, email
  - Liaison contact info: name, title, address (post optional, city/state required), phone, email
  - Social media accounts (FB, Twitter, tumblr, Instagram, custom)
  - Birthday (membership type changes accordingly as members age)
  - Organization affiliations and titles (current → historical nice, but not vital)
  - Membership status (current and historical)
    - Date joined, dues history, date lapsed, etc.
  - Role of youth in organization
- Email subscriptions
- Participation status (current and historical)
  - Governance: Working Groups, Board of Directors, Advisory, Mentorship
  - Event attendance and program participation
  - Donor history
- Contact Preferences (email, post, phone, do-not-solicit)

DONATIONS & CAMPAIGNS/DRIVES: Members & Non-Members

- Collect info about donor
  - All “Member” fields available, with ability to customize data fields as optional or required for each campaign or drive
  - Manage donor preferences
    - Visibility (anonymous, public)
    - Scope (individual, organization)

        - Contact (do not email, phone, mail, solicit)
- Manage campaigns/drives
    - Campaign/drive listing on website
        - Description and stakeholders
    - Customize visibility
        - Public
        - Private: invitation only via link
    - Make shareable via email or social media
- Track donations
    - Donor type (member → type, non-member)
    - Details
- Process donations
    - Payment type
        - Credit Card via online form
        - Check or money order via post
        - Cash on site
    - Payment frequency
        - One time or recurring (only available via credit card)
- Track follow-up
    - Status of thank you given
    - Report on donation amounts and types over timeline
    - Track donation history in user profile in CRM

EVENT/PROGRAM MANAGEMENT: Individuals & Organizations
Outreach
- Create and display event or program listing on website
    - Event or program description, stakeholders, & location
    - Customizable registration period (open or set)
    - "Sub-events" within event or program (e.g. workshop, optional day, volunteer opportunity)
    - Fee Structure (sliding scale, tiers for members or non-members, "add-ons" - e.g. optional day programming, discount codes)
    - Customize visibility
        - Public
        - Private: invitation only via link
- Targeted Outreach
    - Share listing to past attendees or other relevant stakeholder groups via email list or social media

Registration
- Process event or program registration online through website form
    - Individual
    - Organization (one person registers multiple people from an organization, collect basic contact info of each individual)
    - Set registrant cap, if desired
- Manage and track registrations for "sub-events" or "sub-programs" within the event or program (e.g. workshop, optional day, volunteer opportunity)
- Collect information about registrant
    - All "Member" fields available, with ability to customize data fields as optional or required for each program or event
    - Membership type and status (e.g. Youth, active in good standing; Non-member; Interested in Membership)

    - Then, participant type: Speaker/Facilitator, Adviser, Attendee, Volunteer
- Calculate Registration Fees (if applicable, i.e. not a free event)
- Payment of Registration Fees (if applicable, i.e. not a free event)
  - Credit Card directly through website form
  - Payment by check or money order
    - Provide payment and mailing details
  - Payment by cash (on-site)
- Confirmation email to registrant
  - Customize message text
- Link this data with Membership CRM
- Track & Report registration information
  - List of registrants, type of participant, date of registration, and accompanying payments (e.g. status of payment – not paid & waived; not paid & cash on site; paid in full with CC)

Follow-Up & Tracking

- Track event or program outcomes and add to CRM
  - Attendees
  - No-shows
  - Payments
- Make past events or programs archived/searchable on site
  - Maintain details
  - Add event resources (e.g. presentation slidedecks)
- Other follow-up
  - Track non-member attendees to recruit
  - Track attendance history in user profile in CRM
- Ability to duplicate event or program listings to be edited for a use in a future event or program

OUTREACH & ENGAGEMENT: Members & Non-Members

- Email
  - Process online mailing list subscriptions via simple website form
    - Collect minimal subscriber information (name, email, birthday)
- Display a confirmation page when signup is completed
  - Send a welcome/confirmation email with subscription details
- De-dupe records from incoming signups if this can be automated, maybe don't need manual review
- Check that email addresses entered into the web form have valid format (not spam)
- Create/send targeted email blasts
  - By mailing list
  - By other data points (customizable), e.g. multiple states to create a regional eblast
- Social Media
  - Ability to export social media contact info
  - All aspects of website visible elements shareable on social media (via linking or a button)

CRM DATABASE ADMINISTRATION: General

- Merge individual/organization contacts
- Audit changes to records
- Create custom fields
- Add/edit/delete CRM users
- Archive old records (e.g. organization dissolved, death)
  - Make a set time period of 18 months of inactivity = inactive
  - Maybe an archive/inactive checkbox for searches