Nonprofit Center of Northeast Florida

Request for Proposal:
CRM/Member Database

Issue date: 3/23/2018
Responses due: 4/13/2018
Submissions due to: Deirdre Conner, dconner@nonprofitctr.org
Project budget: See below
Goal for launch: 5/1/2018

About Us

A true community initiative, the Nonprofit Center traces its roots back to a 1998 Jacksonville Community Council, Inc. (JCCI) study of the community's nonprofit sector, which called for the creation of "an organization to support and advocate for a strengthened nonprofit sector in Northeast Florida." In 2002, the Nonprofit Center of Northeast Florida opened its doors with crucial commitments from local philanthropists and the support of the nonprofit community.

The Nonprofit Center serves all 501(c)3 organizations located in Northeast Florida, especially our 250 nonprofit members. The Nonprofit Center strengthens your organization, builds your capacity to deliver on your mission, and signals a commitment to building a thriving sector, collaboration, and the Northeast Florida region.

The Nonprofit Center is a vital support system for our local nonprofits. We provide services, programs, and information resources to our members while advocating for the Northeast Florida nonprofit sector locally and at the state level. We provide local government, civic and business leaders, and the media insights and information to promote smart decision-making and public support for local nonprofits.

Context

The Nonprofit Center currently uses a custom built, membership database application. Though the database was purpose built for the needs of the Nonprofit center, there has been a significant amount of growth in the sector and in the role of the Nonprofit Center as a community resource and the database has reached capacity as far flexibility, integration and capacity given the number of programs, events and members managed by the Nonprofit center. Customization to meet the changing needs of the organization is nearly impossible and staff have adapted by relying on external resources, such as Excel to effectively manage their workloads. The current database can be effectively broken down into several functional categories, including-

- Member management
- Member engagement and communications
- Website management

Member management and engagement is at the core of the current data infrastructure. As a member organization, it is imperative that the NPC have a robust membership infrastructure. The current database is extremely focused on back end functionality and though it is integrated into the fabric of the website, does not serve the purpose of a membership portal or integrated membership solution; data entry and member demographics are captured only through certain touch points and inconsistencies have developed because of the lack of integration with other systems.

Another significant challenge is tracking individuals vs. organizations. The current data structure only tracks individuals associated with a particular organization. As a result, engagement is significantly reduced as individuals transfer from member organizations to non-member organizations. As individuals move from organization to organization, there is currently no efficient way of tracking data associated with the individual. It is

understood that the engagement priority of the Nonprofit Center is to the member organizations, but there are significant benefits to implementing a variety of engagement and communication strategies that are custom tailored to both individuals and organizations.

Engagement is often a cumbersome process as there is currently no direct integration with mass mailing platforms. Staff members are often tasked exporting from the current data platform and creating multiple email lists to manage events and communications. From a data management standpoint, the lack of flexibility has limited the available opportunities for tracking important sector beneficial data. It is currently impossible, without much manual intervention, to effectively correlate data contained within the NPC "back end" data system with other important community and sector data points. This capability is important to identifying trends, understanding the performance of the sector and deciding where and what kinds of resources are necessary to support the sector. Email and website are the two primary engagement tools used by the Nonprofit Center. As discussed previously, email engagement would greatly benefit from a comprehensive association/membership platform. Another area of significant opportunity is website integration. The current back end data system does provide website integration and management, but the system relies on HTML coding and specific formatting to effectively push content to the website.

The current "back end' database was built as the supporting structure for the website and contains a number of elements that function to content manage the website as well as manage the membership database. Although the system is effective, it is not capable of scaling and any customizations require complicated coding. The website and database design does not lend itself to 3rd party integrations for resources such as payment processing, event management or communications. As a result, the website design is relatively static and any integrations simply a redirect to the specific tool or process.

In addition to the main membership and website database, data is currently housed in a number of other places. Excel spreadsheets are often used to store mailing lists, event rosters, and budget information. Although Sharepoint is used for file storage and collaboration, the data is still contained in spreadsheets and is not readily accessible or indexed to other data resources. Data is also stored in Survey Monkey, the payment processing system, Quickbooks and marketing platforms. With this collection of data systems, it is becoming more and more challenging to effectively keep track of interactions or create a comprehensive picture of the organization.

From a functional standpoint, the organization facilitates a number of initiatives, each with the goal of enhancing the strength of the nonprofit sector. The specific needs of these initiatives must be captured and integrated into a whole organization data strategy, supported by an adaptable, flexible and expandable data system.

Project Lead

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RFP Timeline

RFP Issue Date: 3/23/18
Responses Due: 4/13/18, 11:59 p.m.
Finalists Selected & Contacted: 4/20/18
Finalists Presentations/Discussions: 4/23-27/18
Winner Selected & Contacted: 4/30/18
Project Kickoff: Immediately following selection

Budget
$25,000-$50,000
Prefer 2-3 phase/tier approach with cost breakdown

Functionality Requirements & Services

I. Member management
   1. Multi-tiered membership structure. Track memberships at organization and individual level.
   2. Multiple engagement levels
      a. Member organizations
      b. Individuals within member organizations
      c. Board members
      d. Job/Skill classification- HR, executives, finance, IT, etc.
      e. Partner members
      f. Donors
      g. Affiliates
      h. Vendors
   3. Committee/Convening tracking.
   4. Integrated renewal process, including auto renewal
   5. Organization level member management. Organization level administrators will have the ability to manage individual members.
   6. Member portal. Members require the ability to edit certain aspects of their member profile. For example: update contact information, add skills, etc.
II. Marketing
   1. Segment based marketing for member types and interest/focus areas.
   2. Marketing automation. Personalized automated welcome emails, registration confirmations and reminders.
   3. Newsletter creation. Personalized headers with segment based content blocks for monthly newsletter.

4. Analytics. Click thru rates and behavior analysis.
5. Email templates. Create and store templates for repeat use.
6. Device agnostic emails. Emails should be formatted for mobile use and engagement on mobile devices.

III. Website content management system- The system can take the form of a fully integrated platform or an integration to a third party CMS such as Wordpress or Drupal.
1. Device agnostic website
2. Content block integration with CRM platform
3. Member portal section
4. Separate member areas based on level of membership
5. Secure file sharing
6. Advertising blocks for partner members.
7. Indexed and searchable website
8. Dynamic calendar for events

IV. Social integration
1. Job board
2. Board member recruitment board
3. Social media integration and analytics
4. Membership app with social feed
5. Membership social networking tool, website and app integrated. Connect members with similar interests or areas of expertise.

V. Event Management
1. Create individual event websites and campaigns.
2. Mobile event app with schedule and social integration.
3. Event registration
4. Payment processing
5. Event budget tracking
6. Segment based ticketing. Provide paths for event attendees.
7. Session registration and management.
8. Speaker/Presenter segment. Provide custom resources for presenters. Include a database of speakers and associated survey data/ratings.
9. Waitlist management
10. Survey data integration
11. Non-member/guest registration
12. Auto population of member information when logged in.

VI. E-Commerce
1. E-Commerce site for sales of products and member resources
2. Shopping cart style layout

VII. Finance Integration
1. Payment gateway/merchant account integration. Authorize.net, Paypal or Stripe
2. GL integration - Quickbooks

VIII. External data integration
1. Ability to use custom fields for external data.
2. 3rd party API integration
3. External data import and export

4. Built-in survey capability or integration with 3ʳᵈ party survey platforms such as Survey Monkey or Microsoft Forms (see also under X. Reporting)

IX. Donor relations
1. Ability to create donor and fundraising campaigns.
2. Built-in capability or integration with 3ʳᵈ party crowd sourcing platforms

X. Reporting
1. Custom dashboards
2. Data aggregation- Example workflow- A dashboard or survey that will provide nonprofits with key financial and organizational indicators (perhaps 10-20), including data points that are both self-reported and from public sources (such as 990 data). The responses will be used to provide a semi-customized report that includes trend data, based on other organizations' responses to the survey, advice and local and national resources and best practices. Each organization's results should be tied back to their organization contact record, helping us (a) customize their suggested professional development opportunities and (b) better evaluate the impact of our work over time, as we plan for organizations to take the survey yearly or at least on a semi-regular basis.
3. Custom report building engine
4. Import and export capability
5. Stored reports and queries

XI. Implementation
1. Dedicated implementation team and/or local implementation specialist
2. Please provide 3 client references for similar projects