Party Database Project (Phase 2):
CiviCRM member and supporter database, integrated with existing websites, for 2 small political parties

REQUEST FOR PROPOSALS

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1. Overview

The Asia-Pacific Greens Federation (APGF) is seeking proposals to implement and provide one year of support for a CiviCRM membership database for two small and emerging political parties in the Federation - India and the Philippines. There are a number of other Greens political parties in the region which will soon need such systems, and it is intended that this pilot project for two countries will develop a model system for those other countries.

APGF has conducted a scoping project to identify functional requirements, and classify them into necessary and merely ‘desirable’. It recognises that each country will have slightly different needs, and will initially not have significant internal resources to develop their own systems. In light of these constraints, the intention is to implement only the minimum functionalities initially, with further functionality added as allowed by the available budget.

CiviCRM has been selected as the CRM platform because much of the necessary functionality is available “out of the box” and is open source. Green parties in other parts of the world have mixed experiences with CiviCRM. Notably its ease of use is felt to be inferior to other platforms, so simplifying the UI and workflows is an important non-functional requirement for APGF. Our initial scoping has identified a number of CiviCRM “themes” that may simplify and streamline the user interface and experience, though further identification and the selection of a theme will be the responsibility of the selected consultant/vendor.

The India Greens Party and the Green Party of the Philippines currently collect membership information to simple spreadsheets through Wordpress websites, and have the inhouse expertise to maintain these sites. The advice of the selected consultant/vendor will be sought on whether Wordpress or Drupal is a better basis for the database and CMS, given the inhouse Wordpress expertise already within parties and the list of required functionality.

2. Organisational Background

APGF is a federation of 21 Green political parties across the Asia, Pacific, and Middle East regions. The Federation exists to support its member parties, build their capacity, create a regional political presence, represent the region to the Global Greens, and generate regional networks of leaders and activists pursuing political change aligned with the Global Greens and assist those which lack the financial and technical capacity to implement their own solutions.
3. General Requirements

APGF is seeking a basic integrated CMS and CiviCRM system to handle contacts for small emerging political parties in various Asia Pacific nations. As there will inevitably be slightly varying needs in different countries, and as resources are currently very limited, in order to promote the "universality" of such a system, we have identified several “philosophical" or strategic architectural decisions:

1. Try to limit features of the system to those that already come “out of the box” - that is, avoiding bespoke coding, and using publicly available open-source modules to extend functionality where necessary and desirable.
2. Different countries’ systems will need to have different hosts and installations, rather than a single multi-country system.
3. Try to limit the functionalities to the strictly necessary ones rather than implement complex “nice to have” ones. So, for example, if it adds too much complexity, we can live without complex multi-level hierarchies, document management, or cases.

In this light the required system should include but not be limited to the following:

1. Complete membership and supporter database system with robust reporting abilities, able to support 100,000 contacts and segmenting of contacts by basic place/town/province.
2. Electronic newsletter facility.
3. Event management system including the ability to take electronic payments.
4. Robust reporting on income from membership dues, donations, and events.
5. Support for a number of payment gateways, specifically including CCAvenue.

The Google spreadsheet CiviCRM customisations APGF contains much of our thinking so far, and will continue to be a living document for some time. The left hand tab/sheet, Overview is an index to data in the other sheets, and lists the fields that we anticipate will be needed.

4. Functional Requirements

The Google spreadsheet “CiviCRM customisations APGF” has an extensive number of items in its functional requirements sheet and some items are open to discussion with the vendor. We have attempted to list requirements in a scale of necessity/desirability, and as mentioned above, we are more determined to keep the system simple to start with, rather than to implement non-essential functionalities. So, for example, multi-languages may be important or essential in the future, but would not be implemented initially as English is sufficient.
5. Contact Roles

Contacts will sometimes have multiple roles, characteristics, and relationships. For example, contacts can be:

- Organisation - eg Branches of the party
- Individual supporter, donor but not paid-up member
- Individual paid-up member
- Individual member and volunteer and branch coordinator and parliamentary candidate and national press spokespeople etc.

Vendor proposals should specify how it is intended to handle these possible attributes. For example, volunteers might need a custom field set to record what skills they have to offer.

6a. Levels for Party / branch organisation

There is a logical hierarchy to organising political parties, but clearly it is not the same for each country - there will always be branches (that may or may not map directly onto electorates). Branches will probably reside 'within' province- or state-level organisations, and province-level organisations within national parties. As examples, the India Greens Party, although it is quite young, already has 14 Branches, and the country has over 500 national constituencies. The Philippines has government/administrative levels that divide it into a hierarchy of about 17 regions, 80 provinces, 1400 municipalities/cities, and 40,000 barangays (suburbs/villages). As such, the number of levels in organisational hierarchies, and the associated view, edit, and access permissions for different user levels, will differ by country.

For obvious reasons it is highly desirable that the Party database can segment contacts by the area that each branch covers, i.e. it can be deduced from the address. But also, in principle, this needs to be dynamic as it will change over time. For example, there are 14 branches currently in India, each covering multiple constituencies, but in the near future there could be many more branches, each covering fewer addresses.

6b. Levels / access control for database users

Administration of memberships will initially be centralised at the national level. This is both for quality control reasons and to limit database training needs to the central office staff. Branches (via Branch Convenors), for example, will not have access to the database to view, change or add data. Similarly, they will not initially have access to reports that might email all the members in their branch; branch convenors would supply text to the central office which would run the reports/email system.

User database roles:
Further discussion needs to be had with the vendor on this issue but generally speaking, access to data and reports must be limited in different ways for different classes of user. As an indication:
- **Members/supporters** must be able to login to the CMS with a username and password to see their financial history (from CiviCRM) and probably to adjust their own address details.

- ‘**Reception desk’ users** might be able to view certain contacts but not to change them, and not to run reports, and preferably not be shown any other menu options in CiviCRM.

- **Database data entry users** would be able to enter and update contact’s details and revenues, but not be able to run reports.

- **Database manager users** would be able to run certain reports and amend data.

- **Database super users** would be able to run all reports, amend data, and create users of all types.

- **Database admin** would have visibility to all reports and data and do higher level system configuration changes (e.g. new custom fields).

Specific user types and their associated permissions will be discussed with the selected contractor/vendor during implementation.

### 7. Hosting

The vendor should supply APGF with recommendations and costings for server services bearing in mind:

a) For public perception as well as security reasons, servers should very preferably be in the Parties' home countries, or another nation which the Party prefers (Singapore has been suggested for the two current pilot countries).

b) Database backups should be available to the Parties to copy offsite if necessary

c) The system should be able to accommodate at least 100,000 contacts at acceptable speeds

d) The system should be able to send many emails at a time, at least 10,000 emails per month, and these emails should not appear as spam. APGF would like to discuss vendors’ proposals for delivery of bulk SMS messages.

Costing estimates should be provided for:

i) Monthly emails to 1,000 contacts,

ii) Monthly emails to 10,000 contacts, and

iii) Sending 1,000 SMS messages

Costings should be given for the first year, including server costs, and indicative costings for follow-up years, as noted in section 11.

### 8. Data Migration

Data is currently held in fairly simple spreadsheets, and comprises about 5000 contacts for the India party, and about 400 for the Philippines party. The Philippines party collects data for over 100 fields (see the **Phil Member tab** of the Customisations spreadsheet), though standardisation through this database project should result in a simplified list. The parties are open to discussion with the vendor on how to simplify their data model.
9. Training

Train core party ITC staff on the use of CiviCRM, and ideally provide documentation when UI/UX functionality changes have significantly modified core processes. It is not anticipated that extensive training will be possible within the budget, and APGF recognises there is much online documentation of CiviCRM, but some initial training and guidance of inhouse IT professionals would obviously simplify their learning curve.

Topics should include:

1. Basics for Individuals and Organizations
   - Entering Individuals, Organizations
   - Best practices for data entry and hygiene (address formats, etc.)

2. Managing Membership revenues
   - Administering online payments from payment gateways (which must include CCAvenue in India) and other sources
   - Sending email receipts automatically
   - Sending timely membership renewal reminders

3. Managing Donations
   - Entering a contribution from an individual or an organization
   - Reporting on donations,
   - Sending receipts/acknowledgments automatically

4. 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

5. Creating email campaigns
   - Searching/filtering for Contacts and adding them to an email blast

6. Creating direct mail campaigns
   - Using reports to create a list of postal mailing addresses

7. Advanced reporting/searches
   - Walk us through a few of the more complicated reports on the “Reports/Searches” worksheet of CiviCRM Customizations for us so we can understand how to build or modify these reports ourselves

8. Other admin tasks
   - Adding/managing new user accounts (for party 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)
10. Ongoing Support and Development

We seek to engage a vendor that can also provide ongoing support after the initial CiviCRM launch, for an initial period of 1 year. As well as regular maintenance tasks such as installing security updates, backups, etc., it is probable that from time to time, the installation of new systems for other Federation members in other countries, and implementation of new functionalities, will be required. General information on your support services and your support contract pricing and structure (monthly retainer, hourly, etc.) would be helpful for us.

APGF seeks assurance that the vendor has a demonstrated ability to:
- Run rigorous backup procedures.
- Install and maintain system updates to CiviCRM and the CMS it sits on.
- Will be able to answer support queries at times that fit into at least some working hours in India and the Philippines.
- Provides a remediation guarantee on their development and support work.

11. Budget

APGF anticipates that considerable discussion will take place with the vendor, and appreciates that not every desired functionality may be achievable given the budget constraints of these young parties.

The total budget available for this project is $18,500. Proposals cannot be more than this amount, and it must include all project costs, including:

- Vendor/consultant fees, including taxes,
- Hosting costs for 12 months,
- Any DNS/domain costs,
- Security and maintenance costs for 12 months,
- Training of key staff,
- Plugin/integration fees,
- Email send costs. Estimates should be provided and accounted for to include:
  1. Monthly emails to 1,000 contacts,
  2. Monthly emails to 10,000 contacts, and
  3. Sending 1,000 SMS messages,
- Any other ancillary costs.

12. Miscellaneous observations

- Vendor proposals should state their experience with setting up similar systems and supporting them over time; and preferably be able to supply reference sites.
- Vendor proposals should specify which Wordpress/Drupal plugins are to be used.
- Vendor proposals should specify which CiviCRM extensions are to be used.
• **Ease of use** Staff/volunteer training time and ongoing data entry staff time are probably going to be the biggest ongoing costs after the end of the initial 1-year support period. The tenderer should emphasise the ease of use / UI for the proposed system.

• Costings should estimate setup and server costs for the first year separately, and give separate cost estimates for support and server costs in subsequent years.

### 13. Proposed Timeline

Below is a framework timeline to consider for the implementation of the database project. This framework timeline is intended to guide those submitting proposals, and will be negotiable with the selected consultant/vendor.

<table>
<thead>
<tr>
<th>Who</th>
<th>Time</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Finalise Request for Proposals (RfP) document</td>
<td>Project Team</td>
<td>24 June 2021</td>
</tr>
<tr>
<td>2.2 Circulate RfP</td>
<td>APGF Secretary</td>
<td>25 June</td>
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<tr>
<td>2.3 Close of tender period</td>
<td>Developers</td>
<td>3 weeks</td>
</tr>
<tr>
<td>2.4 Selection of consultant/vendor</td>
<td>Project Team</td>
<td>1.5 weeks</td>
</tr>
<tr>
<td>2.5 Development by consultant/vendor</td>
<td>Developer Parties</td>
<td>4.5 weeks (neg.)</td>
</tr>
<tr>
<td>2.6</td>
<td>Developer APGF liaison</td>
<td>4 weeks (neg)</td>
</tr>
<tr>
<td>2.6 a) Data migration</td>
<td>Developer Parties</td>
<td>4 weeks (neg)</td>
</tr>
<tr>
<td>2.6 b) Alpha testing</td>
<td>Developer APGF liaison</td>
<td>4 weeks (neg)</td>
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<tr>
<td>2.6 c) Training and training materials</td>
<td>Developer APGF liaison</td>
<td>4 weeks (neg)</td>
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<tr>
<td>2.6 d) Iterate above</td>
<td>Developer APGF liaison</td>
<td>4 weeks (neg)</td>
</tr>
<tr>
<td>2.6 e) Accept system</td>
<td>Developer APGF liaison</td>
<td>4 weeks (neg)</td>
</tr>
<tr>
<td>2.7 Beta testing with parties</td>
<td>Developer and parties</td>
<td>2 weeks (neg.)</td>
</tr>
<tr>
<td>2.8 Go live</td>
<td>Developer Parties</td>
<td>2 weeks (neg.)</td>
</tr>
<tr>
<td>2.8 Project Team</td>
<td>11 October</td>
<td>11 October</td>
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