



## Request for Proposals

The Washington Area Bicyclist Association (WABA) seeks consulting services to assist in moving to a new Constituent Relationship Management platform.

### Background:

The Washington Area Bicyclist Association (WABA) is working to create a healthy, more livable region by promoting bicycling for fun, fitness, and affordable transportation; advocating for better bicycling conditions and transportation choices for a healthier environment; and educating children, adults, and motorists about safe bicycling.

WABA currently uses Salsa Classic to manage membership, donor relationships, event registrations, advocacy actions, and email marketing to a supporter base of 60,000 and a membership of 6,000. Reliability concerns and the limitations of Salsa's reporting, membership and relationship management tools have led the organization to seek another platform.

WABA uses G-Suite for its internal communications and file management, and Wordpress as the primary platform for its website.

### Details

WABA seeks a CRM with robust, flexible, and intuitive tools for:

- **Fundraising:**
  - Powerful donor relationship management tracking and analysis
  - Two-way integration with G Suite to track contacts and maintain relationship consistency
  - Grant life-cycle tracking
  - Peer to peer fundraising
  - Sponsorship prospecting and management
  - Sophisticated relationships between constituents, households, and organizations

- **Member management:**
  - Flexible, multi-person membership options: Family, corporate, household.
  - Easy to use member portal for managing user personal data and access to donation, action and membership history.
  - Easy (from an end user standpoint) Integration with Wordpress to provide member specific content
  - Integration with other modules to provide member specific content and options.
  - Efficient workflow for regular (weekly) membership fulfillment
- **Payment processing:**
  - Backwards compatibility with Authorize.net
  - Paypal/Apple Pay integration
  - Two-way integration with Quickbooks
  - Sophisticated recurring payments
  - Complex transactions (e.g. Event Registration + Membership)
  - Webstore with fulfillment tools
  - Donation processing (creating, distribution and retention of tax letters)
- **Events:**
  - Flexible ticketed and non ticketed pricing structures that integrate with donor and advocacy modules.
  - Robust guest registration options
  - On site check-in and registration functionality
  - End user registration functions (e.g. change meal preferences, add guests)
  - Straightforward integration with peer to peer fundraising and organizing modules.
- **Hyperlocal, regional, and state level advocacy and community organizing:**
  - Online & in-person petitions
  - Multi-targeted email actions
  - Customizable map based list segmentation
  - Peer to peer organizing
  - Accurate state and local official targeting
  - Customizable, flexible email action targeting
  - Phone and social media actions
  - Listserv hosting or intuitive back-end integration with third-party communications platforms (e.g. Google Groups, Slack, etc)
  - Robust follow-up functions
  - Custom embeddable web forms to collect user information, location, file upload

- **Email marketing:**
  - Reliable deliverability/whitelisting/authentication.
  - Dynamic content that can pull from all modules
  - Dynamic delivery timing
  - Sophisticated targeting that can pull from all modules
  - Reply management
  - Flexible automated sequencing
- **Volunteer Management:** Signups, shift management, time tracking, on-site check-in, automated email and membership sequencing, and volunteer relationship management
- **Data health:** including end-user focused de-duping and postal mailing address verification
- **In-person outreach:** User-friendly tools for email capture and conversion.
- **Website integration:** end user elements should easily embed inside waba.org.
- **Internal Controls:** detailed, flexible platform-wide permissions.
- **Mobile friendly** access to all CRM modules.
- **Google Analytics** integration or other conversion and user flow tracking.
- **Project Management:** Internal task assignment, calendar integration and project mapping

Based on internal research, we think that this is probably a build of Salesforce with some additional plugins to accommodate advocacy, events, and email marketing needs, but we are open to exploring other options.

### Scope of work

WABA seeks consulting services to conduct a needs assessment, build out a Salesforce (or other platform) install in collaboration with staff, and assist with the migration of 15 years of data.

WABA has financial resources and substantial senior level staff time committed to both the migration process and platform costs.

### Timeline

Work to begin as soon as possible. WABA would like to be operating a full-featured test of the platform by September 2018 and complete the transition by November 2018.

### Point of Contact

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