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Call for Proposals: Implementing CiviCRM for Joomla! 1.5.X

1.0 About CIVICUS

CIVICUS: World Alliance for Citizen Participation is one of the leading and most diverse international civil society networks, with members and partners in more than 100 countries and a staff of 35 people from over 20 countries. It implements a range of programmatic activities focusing on strengthening civil society and its role in governance and development worldwide. It also serves as a convener of global civil society leaders through its annual World Assembly.

2.0 Our CRM Needs

CIVICUS is continuously in need of a tool to manage its relationship with its vast, yet growing constituent base. Whilst we have consulted widely and have decided on CiviCRM as our tool of choice, it becomes necessary for us to commission a consultant to review our needs (stated below) and propose an implementation plan, complete with timelines, activity and milestone list and cost.

The Proposal must cater for the following specific requirements as well as additional requirements you may consider necessary in your experience implementing such systems:

- 2.1.1 Financial transactions:** The CRM must be able to facilitate from end to end-end financial transactions including: donations, membership fees and membership renewal fees collection. By end to end, it is meant that the CRM will provide a public facing method for advertising, collecting, and issuing acknowledgements for all listed financial transactions.
We currently use the *PayFlowLink* gateway an offering by VeriSign and PayPal for processing financial transactions on our website, we are positively disposed to suggestions to try/use other payment gateways.
- 2.1.2 Constituents relations tracking and reporting:** The CRM must be able to track and report (auto and user triggered reports) all liaisons with our constituents, including emails (and email tracking), telephone logging etc. CIVICUS has five (5) major categories of constituents: staff, members, donors, project partners, bard members.
- 2.1.3 Reports:** The CRM must in addition to constituent liaisons tracking and reporting be capable of tracking and reporting on such things as: total constituent base, total dues/fees collected/processed in a time period, new members recruited, number of expiring memberships, membership renewals in a time period etc.
- 2.1.4 Newsletter subscriptions management and distribution:** the CRM must be able to provide a public facing facility to allow constituents and members of the public to signup to our newsletters (any number of newsletters though we currently issue five

(5) newsletters – e-CIVICUS; CSW Bulletin, AGNA members monthly reports, press release and Action alerts – with varying frequency), manage their subscriptions (change contact details, change frequency of receipt of communications etc. opt –in to new communications or opt-out of existing subscriptions)

- 2.1.5 Social:** the CRM must be capable of ‘social’. Allowing us to push messages to constituents’ facebook, twitter and LinkedIn profiles - provided we have users permission (at registration, all constituents must be offered an option to link their public/social profiles – LinkedIn, Facebook, twitter, Google etc.).
- 2.1.6 Automated messages:** the CRM must be capable of issuing automated messages once certain parameters are met or upon completion of certain events e.g. (a) all members whose membership are due for renewal must get reminder notices every month, three (3) months in advance and once every week, one month in advance, and every week for one month upon expiration of membership and once every month for the next two months. (b) this automated messages must stop once membership is renewed whether or not before the due date. (c) Once subscription, donation, membership renewal is complete issue a thank you email
- 2.1.7 Manage membership:** the CRM must be capable of managing every aspect of the membership journey in ways already highlighted above as well as in the following ways:
 - (a) terminate access to all resources marked members only civicus.org and its sub-domains
 - (b) restore access once constituents’ status changes
- 2.1.8 Multiple access levels:** like all such systems, the CRM must be capable of providing multiple levels of access privileges. This privilege system must such that can be administered internally once CRM has been fully implemented.
- 2.1.9 Integration with SharePoint** – CIVICUS is implementing SharePoint as a Knowledge management and collaboration platform for its staff and key stakeholders. The CRM must be capable of integrating with SharePoint in order to facilitate at least the following:
 - a) Cross linking between contacts in the CRM with documents and other knowledge product in the Knowledge Library housed in SharePoint
 - b) Dumping/sending reports to SharePoint Knowledge Library or other designated location within SharePoint - this might be achieved by building an auto email facility into the CRM which will email all designated reports to a designated email address which will then by way of workflows deliver such to relevant locations in SharePoint (we are keen to see how else you might be interested in doing this)

3.0 Details your proposal must provide

3.1 Evaluation matrix – We are interested in knowing how you will implement CiviCRM to meet our listed needs and still leave it scalable in order to cater for needs that may arise in the future. We thus require that you create a matrix detailing which of the requirements you will configure CiviCRM to meet and which will require you to build or adopt custom/third part modules and/or components.

Please use the format:

Main Requirement	Child/children requirement	Does CiviCRM meet this out of the	Do you need to build custom
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		box?	modules or adopt existing 3 rd party solution

3.2. Implementation (hosting) Landscape – CIVICUS maintains a basic dedicated server with Hostgator. This server is houses our website created in Joomla 1.5.22 as well as other web resources written in PHP and MySQL. It is our firm understanding that this server is capable of running CiviCRM out of the box. Should you however have any special requirements, please provide as much details of this as possible in your proposal (please include the section: Special Requirements)

3.3 Support: State the level of support you are willing to offer and the associated cost.

3.4 Training: State the level of training, expected outcome(s), requirement(s) and cost.

3.5 Your experience: Please provide details of three implementations of CiviCRM you have completed in the last 12- 24 months. Detail you approach and outcomes and any lesson learnt. Please include for each reference and also say whether or not you can arrange a work through of these systems.

3.6 Additional information/advise: We are keen to learn from you any ideas, suggestions or thoughts that may assist us in ensuring maximum benefit of the CRM once complete.

3.7 Project schedule: Detailed schedule showing work break down, activity sequence and dependencies and key milestones.

3.8 Itemised project cost: An itemised project cost showing details of associated cost to each identified activities/milestones.

3.9 Method of submission: All proposals must be submitted by email to: proposals@civicus.org. Hardcopies will not be accepted.

4.0 Key dates

Request for additional information: Our staff will answer all questions relating to this call for proposal between 1:00pm and 3:30pm, weekdays until Tuesday 5th July 2011

Submission deadline: All proposals must be submitted on or before Tuesday 12th July 2011

5.0 Miscellaneous:

- Only consultants whose proposals are shortlisted will be contacted
- This document is not a contract and should not be treated as such