

Delaware Highlands Conservancy

**An Operations Support
Database Development Project**

REQUEST FOR PROPOSAL

Prepared June 24, 2010

Overview

The Delaware Highlands Conservancy is seeking a vendor to design an internal database system that will replace the current database system, which lacks the functionality needed to support future growth of the organization and its activities. An October 2010 target has been set for making the new system fully operational.

The Organization

This system The Delaware Highlands Conservancy is a land trust dedicated to the protection of open space. It accomplishes this objective through a combination of activities: accepting easements on land, running educational programs, publishing, and working with other organizations. It funds these activities through a combination of membership dues, donations, grants and contracts.

The Conservancy has its headquarters in Hawley Pa. It opened an office in Monticello NY in recognition of the potential for activities in Sullivan County. Although there is a Land Coordinator with primary responsibility for NY, staff routinely services needs in both offices.

The Conservancy has been in existence for 16 years. It holds more than 60 easements – 6 added last year – for a total of approximately 12,600 acres protected. It ran 40 educational programs in PA and NY during the past year.

The Conservancy has grown very rapidly. It has accepted more easements than almost any other land trust in Pennsylvania. It ran more programs than other comparable organizations. It works actively with a broad range of other organizations, including conservation groups, zoning officials and business organizations.

Activities of the Conservancy are overseen by a volunteer Board of Directors, some of whom live outside the area and who are ‘week-enders.’ Day to day activities are managed by an Executive Director who supervises a staff of 4 people. Because of the size of the organization, members of the Board provide more than purely oversight activities, frequently taking responsibility for carrying out specific activities, e.g., preparing and publishing a newsletter.

Like many entrepreneurial organizations, growth has increasingly outstripped its supporting infrastructure. There are many files in many different physical forms. The files are generally maintained on a server that is physically located within the Hawley office. These files are physically independent and a combination of file maintenance and reconciliation are consuming more and more time. Additional time is required to copy documents and distribute them to directors and staff. Because there is no readily accessible project tracking system, follow-up is a growing problem. There is limited practical capability for people to access the server remotely.

Infrastructure Concerns

The Conservancy has grown from an all volunteer organization to one with a full-time Executive Director, a paid staff, and a functioning committee structure. Like many organizations, this growth was accomplished by meeting needs and satisfying opportunities, with little time available for strategic planning, focusing on overall organizational operations, and building on capabilities presented by new technologies. Consequently, like many very small but growing organization, it now finds itself dealing with a number of problems.

Individual sets of activities have given rise to separate supporting files. These files are separately maintained and often inconsistent with other files containing the same information. This situation means that more and more time is spent determining the applicable system, reconciling differences, etc.

Some files are very limited. For example, the membership/donor file does not adequately reflect the relationship with the organization and, in the case of high potential donors, information that would facilitate future funding.

Substantial efficiencies are potentially realizable once the above records are under control. As an example, membership information should provide an easy basis for both mailing lists and customized mailings.

A tracking system should facilitate both management of projects/grants and follow-up activities, e.g., following up with people who have indicated an interest in volunteering to work with the organization.

Description of Existing Database

Currently the Conservancy uses an Access database to capture basic information for multiple purposes including direct mail, donor management and client management. The Access database is cumbersome and difficult to use. Because of the size – 60Mb – remote access is too slow to be effective. The current Access database is hosted locally on a Windows server that is accessible by both local users and over a VPN.

No routine reports are currently generated. It is expected that in the future the system will support both routine and customized reports. The specifications of these reports are currently being defined. It is also expected that the reports will continue to evolve as a result of using this system.

Summary of Requirements

The database will ideally be able to handle the multiple client management requirements of the organization:

- Land Protection Transactions (Sales Funnel from lead to completed transaction to post sales service and support)
- Donors and Members (Fundraising Funnel from lead to donor to major donor)
 - Legacy Leaders (Bequests of land and money: a subset of both Sales Funnel and Donors)
- Contact Database (for email and direct mail, plus “links” to relevant sales/fundraising projects)
 - Volunteers
 - Staff
 - Professionals
 - Government/Partners
 - Auxiliary Contacts (individuals who don’t fit in other categories)
- Project Specific Database
 - Optional: a connection to the Shop Local Save Land base information

Using the Access database as a model, the staff developed a wish list of capabilities to help them manage client information. This wish list is captured as a multipage document depicting desired screen shots to capture the information. (See attached database powerpoint document).

Land Protection: Managing intake and processing of “Sales Funnel”

- Complete sales funnel and contact management
- Leads
- Priorities
- Easement transactions
- Follow-on relations with landowners

Managing donors, members

- Complete fundraising and contact management
- Leads
- Priorities
- Contact information
- Communications
- Follow-on relations with people
- Optional features:
 - Integration with Quickbooks
 - Automatic acknowledgement
 - Monthly payment processing
 - Packaged reporting & analysis, as well as ability to develop new reports

Contact Management:

- Managing relationships with other organizations and volunteers

General Specifications

- Stable, proven software platform
- Built on a standard platform
- Not proprietary
- Hosted either locally or remotely – if locally, then Windows platform; if remotely, then either Windows or Linux platform
- Maintainable or modifiable by Conservancy staff or its contractors
- At the option of the Conservancy, access to the contractor for advice or other support
- Usable by non-technical users with a minimum of training
- Access from two or more locations – via server or host server or over web

Deliverables and Scope of Services

- Review current system and procedures
- On-going communications and revue
- Design user interface and supporting database
- Implement agreed upon interface and database

Development Stages - Timetable

July 2010

- July 30: Submission deadline for proposals
- Aug 2: Review of submissions by the Infrastructure Team.
- Aug 3: Applicants will be contacted regarding RFP results.
- To follow: Infrastructure Team interviews with selected developer to further discuss specifics of the website and database functionality.

August 2010

- Development of design begins
- Interaction between Infrastructure Team and developer

September 2010

- Continue interaction between Infrastructure Team and developer.
- Finalization of system design and structure
- Import data from existing database
- Database and site testing with refinements as needed.

October 2010

- Staff training
- System goes live

Proposal Requirements

- Submission Deadline: July 30, 2010
- Proposals can be emailed as pdf or word document to info@delawarehighlands.org ATTN: INFRASTRUCTURE or sent via the U.S. Postal Service – postmarked by July 30, 2010) to:
Infrastructure
Delaware Highlands Conservancy
508 River Street
Hawley, PA 18428-0218
- Contents
 - Provide an overview of your company
 - List key team members who will be involved with this project and include a brief bio for each
 - A description of the system that you will be proposing – including an identification/description of the hardware/software that will be required, and an estimate of on-going expenses that should be expected.
 - Brief descriptions of similar projects completed by your company. This description should include at least one example of an infrastructure and database project similar to the one included in this RFP.
 - Cost and timeframe to complete each Phase contained in this RFP
 - Suggestions, if any, going beyond the scope of this RFP
 - 2-3 professional references along with contact information
- Award Criteria
 - An evaluation of the technical proposal
 - Ability to meet the Conservancy's current and future needs
 - The vendor's ability to understand the Conservancy's needs, operating environment and systems requirements
 - Qualifications of the vendor
 - Expected cost of implementing and operating the proposed system
 - We reserve the right to accept or reject any proposal

Appendix 1: Overview of Organization

Board

Conservancy activities are overseen by a volunteer Board of 11 people. Under the terms of the by-laws, Directors serve for 3 years and they may be re-elected for one additional consecutive term, after which they must leave the Board for at least one year.

Most of the Directors have been on the Board and involved in the Conservancy for many years. Identifying and 'growing' new Board members is an on-going concern.

A significant number of the directors live some distance from the Conservancy offices and some are 'week-enders' who often participate in board activities over the phone.

Board members frequently take on non-oversight roles, helping with operating activities of the Conservancy.

Board meetings generally take place every other month. There are periodic 'emergency meeting' when issues cannot wait until the next regularly scheduled meeting. In the latter case, materials are distributed by email and many of the directors participate over the telephone.

Executive Director

Day to day operations are handled by the Executive Director. She is the primary liaison with the Board, as well as with many 'partner' organizations.

Of equal significance, in addition to supervising all of the other Conservancy employees, the Executive Director is the de facto office manager. This is increasingly problematical, since the problems discussed in this document are causing her to spend increasing amounts of time on office operations rather than the more executive role of strategic planning, inter-organizational relationships, high potential donor relations, and public relations.

Committees

The conservancy functions through a committee structure, with committees carrying out a combination of policy and operating responsibilities. The descriptions that follow reflect the current situation. The committee structure and responsibilities of individual committees are currently being re-evaluated.

Executive Committee. The Executive Committee of the Board is comprised of the Conservancy's officers – all of whom are members of the Board of directors. It is authorized to make decisions in periods between regularly scheduled Board meetings.

Governance. At the recommendation of the Land Trust Alliance, the Conservancy established a Governance Committee. This committee is intended to provide assurance that the Conservancy is

operating satisfactorily. It currently is currently comprised of Board members and it meets regularly to discuss the broad range of activities taking place.

Advisory Board. An external Advisory Board was formed several years ago as a means for involving a wider number of people and organizations in the Conservancy's activities. It is comprised of leading members of the surrounding community.

Land Preservation. The Land Preservation Committee is the most active committee of the Conservancy. It oversees all of the land-related activities and makes recommendations to the Board regarding formal actions to be taken. It identifies high priority parcels in collaboration with the Board. When a given parcel is being considered for an easement, it evaluates the desirability of moving forward on the property, evaluates potential easement conditions, and makes recommendations regarding accepting the negotiated easement.

The committee has oversight responsibility for monitoring and stewardship activities.

Outreach and Development. The Outreach and Development Committee has primary responsibility for membership and donor relations, fundraising, and those public activities primarily related to accomplishing these objectives.

Education. Given the importance of educational activities being carried out by the Conservancy, there are current discussions regarding the desirability of setting up a committee to explicitly focus on this area.

Finance. The Finance Committee is comprised of Board members and external financial specialists. While the external auditor sometimes joins meeting of this committee, he is not a formal member. The Finance Committee has overall responsibility for recommending financial policies to the Board, coordinating budgets, overseeing financial operations, and regularly reporting to the Board of Directors.

Personnel. The Personnel Committee recommends personnel policies to the Board. It has general responsibility for evaluating employee performance, as well as reviewing hiring, termination and promotion decisions.

Accreditation. The Conservancy intends to apply for accreditation by the Land Trust Association. This will require meeting a set of standards set up by LTA, as well as an audit by LTA to evaluate the level of compliance with their standards.

Appendix 2: Activities

Easements

A significant part of the Conservancy's operations are based on accepted conservation easements from property owners. An easement is a *legally binding*, permanent restriction on property use.

The decision to accept an easement requires that the Conservancy certify to the conservation value of the property involved.

Easements are negotiated to make sure that they adequately reflect both the property owner's and the Conservancy's needs.

Once the easement has been accepted by the Conservancy, it is legally and forever obligated to monitor the property to make sure that the easement terms have been adhered to, and to legally enforce these terms. Work on the easement continues after the easement is signed. The Conservancy prepares a detailed set of baseline documents – copies of the easement, gps information, photos, maps, etc. The baseline documents are stored in traditional loose-leaf files. They are not routinely needed by anyone other than the Land Coordinators.

Under some circumstances, property owners can realize a substantial tax deduction on their federal income taxes.

Under some circumstances, there may be programs in which property owners can be paid for putting properties in an easement. When this possibility exists, the Conservancy may assist the property owner in applying for these funds.

In return for accepting easements, property owners are encouraged to make contributions to the Conservancy. The amount of the suggested contribution depends upon the size of the property and the expected effort of on-going monitoring. These contributions are divided into a monitoring and a stewardship fund.

The Conservancy has a program assuring annual monitoring of easement properties. This program makes sure that the properties are monitored, that the monitoring activity is used for maintaining contact with property owners, that property owners are notified that the monitoring has taken place, and that there is appropriate follow up on any problems encountered.

Educational Programs

Educational programs are an important component in the Conservancy's overall activities. They are an important part of an overall effort to publicize its work, recruit volunteers, solicit easements, and sometimes, provide revenue.

During the past year, the Conservancy ran 40 programs – some in NY and some in PA.

Some of the programs are subsidized through grants.

Some of the programs are run in collaboration with other organizations. During the past year, the Conservancy offered educational programs in collaboration with Education programs were made possible by collaborations with Sullivan County Planning Office, Sullivan Renaissance, Pike-Wayne Conservation Partnership, Upper Delaware Roundtable, Pocono Mountain Visitors Bureau, John and Helen Villaume Foundation, Wayne County Community Foundation, Federal Forest Service at Grey Towers.

Publishing

The Conservancy is running a small-scale publishing operation. During the past year, it published two widely acclaimed publications – “Shop Local, Save Land Guide to Farms and Farm Markets” and “Shop Local, Save Land Guide to Wood Products, Professionals and Resources”

Publications are generally subsidized by grants. They are distributed free of charge as part of the Conservancy’s overall mission.

Other Organizations

The Conservancy works with many other organizations – In addition to those included in the list of educational program partners – Upper Delaware River Roundtable, Common Waters/Pinchot, Land Trust Alliance, Pennsylvania Land Trust Alliance, Pike-Wayne Conservation Districts, etc.

These relationships range from informal networking to collaboration on specific projects.

Volunteer Management

One of the most important activities of the Conservancy is cultivating volunteers. These volunteers get people involved in the Conservancy, provide the staffing of activities and assist fundraising. Volunteer service is an important tool in identifying people who are future large donors and/or members of the Board of Directors.

The Conservancy encourages involvement at all of its events, providing an overview of volunteer opportunities, obtaining names and contact information.

As a practical matter, the Conservancy loses many opportunities to recruit volunteers. While it may create enthusiasm and obtain contact information, the press of day-to-day activities often means that nobody follows up and encourages these potential volunteers.

Fundraising

Fundraising is a critical part of the Conservancy activities. Quite aside from providing financial resources, it is part of membership/volunteer building, organization relationship building, and public relations.

Fundraising activities are overseen by an all volunteer committee.

Fundraising activities range from special events such as a dinner gala or a golf outing, to running periodic appeals.

Grant Solicitation and Management

The Conservancy solicits and gets grants from other organizations. As is typical, many of the grants are for specific purposes along with related reporting requirements. Less frequently, grants are general purpose.

Accreditation

The Conservancy intends to apply for Accreditation by the Land Trust Association. This will require meeting a set of standards set up by LTA, as well as an audit by LTA to evaluate the level of compliance with their standards.

The decision to seek accreditation was based on an important managerial objective beyond any public relations benefit of being accredited. It was felt that the process of getting ready for accreditation would force the conservancy to re-evaluate its activities and make the transition from being a purely entrepreneurial organization.