



**National Employment
Law Project**

Delivering Economic Opportunity

November 17, 2011

Dear Colleagues, Developers, Service Providers, and Vendors,

National Employment Law Project (NELP) is soliciting proposals for centralized database and file-sharing solutions. As you may know, NELP has offices across the country that work together to address the needs of America's workers in the 21st century economy. We must ensure that donor information, project files, and important administration documents are easily shareable and secure.

Please see the attached RFP for further details about the project and our needs. Proposals are due January 17, 2012.

Thank you,

Bukola Ashaolu
IT Systems Manager
National Employment Law Project

Rebecca Andruszka
Development Director
National Employment Law Project

National Office
75 Maiden Lane, Suite 601
New York, NY 10038
(212) 285-3025 tel
(212) 285-3044 fax
nelp@nelp.org www.nelp.org

Washington, DC Office
1620 Eye Street NW, Suite 210
Washington, DC 20006
(202) 887-8202 tel
(202) 785-8949 fax

California Office
405 14th Street, Suite 1400
Oakland, CA 94612
(510) 663-5700 tel
(510) 663-2028 fax

Midwest Office
3131 South State Street, Suite 302
Ann Arbor, MI 48108
(734) 369-5616 tel
(866) 373-8994 fax

West Coast Office
1225 S. Weller Street, Suite 435
Seattle, WA 98144
(206) 324-4000 tel
(866) 882-5467 fax

**National Employment Law Project
REQUEST FOR PROPOSAL
Multi Purpose Central Database and Shared Drive Solution**

DATABASE DEVELOPERS, CLOUD-COMPUTING SERVICE PROVIDERS, AND SALES AND COLLABORATION SOFTWARE VENDORS

The National Employment Law Project (NELP) is seeking proposals from Database Developers, and Cloud-Computing Service Providers Software Vendors to install, configure, and customize a database platform for our organization. This database will serve as a Central Database for all NELP constituents including members, donors/funders, media, unions, allies and government officials. This database will also be used to track our fundraising and outreach efforts by storing information related to event attendance and associations between our constituents.

In addition, we want a needs/capabilities assessment, alternatives and recommendations for enhancing the file-sharing capabilities of our dispersed staff so that fundraising proposals, reports and presentations can be jointly worked on and submitted.

INTRODUCTION – NATIONAL EMPLOYMENT LAW PROJECT

Mission

For over 40 years, the National Employment Law Project has worked to restore the promise of economic opportunity in the United States. In partnership with national, state and local allies, we promote policies that create good jobs, strengthen and enforce core labor standards, end exclusions from workplace protections, and help unemployed workers regain their economic footing. We work from the ground up to build change, developing and testing new policies at the state and local level, then scaling them up to spur change at the national level. And we partner with strong advocacy networks, grounded in the full range of stakeholders. In doing so, our goal is to leverage NELP's resources and expertise to strengthen the capacity of impacted communities – low-wage workers, unemployed workers, women, immigrants and people of color – to identify and change the systemic drivers of economic insecurity and economic inequality in the US.

Locations

National Office

75 Maiden Lane, Suite 601
New York, NY 10038

Washington, DC Office

1620 Eye Street, NW
Suite 210
Washington, DC 20006

Midwest Office

3131 S. State Street, Suite 302
Ann Arbor, MI 48108

California Office

405 14th Street, Suite 1400
Oakland, CA 94612

West Coast Office

1225 S. Weller, Suite 205
Seattle, WA 98144

Plus three single-person offices and traveling staff

Constituents

Our constituents include

- Media
- Donors/funders (both individual and institutional)
- Members of various NELP groups, e.g., Wage and Hour Clearinghouse
- Unions
- Other Organizations/Allies
- Government officials/Politicians
- Public organizations/departments
- Partners/interested parties

THE PROJECT

Overview of project goals

Current Data Structure

NELP currently uses an outdated internal donor database, online database that manages e-mail lists and multiple sources of static information, e.g., Excel spreadsheets. There are too many databases to maintain, update and synchronize, which more often than not produce inaccurate reports and conflicting or duplicate information. Ultimately the time spent struggling with consolidating these data is costly, in that it is a very inefficient use of limited resources.

Future Data Structure (as a result of this project)

One Central Database that...

- is focused on Member /Ally/ Donor/ Funder Relationships (tracking their giving and involvement with NELP) and contact information
- is accessible to all NELP locations
- has the ability to create multiple levels of user permissions
- has the ability to track constituent involvement with events, webinars and outreaches
- has module for events
- has the ability to import/export financial information from accounting system
- has the ability to create categories and subcategories
- allows possible integration with main website database
- provides accurate information to use in donor and membership processing for our online library (letters and renewal notice generation, other communications, etc.).
- can track deadlines and grant periods (with ticklers)
- can track response by solicitation cells (different mailing executions, etc.)
- provides reporting system to generate reports for members, allies, donor and funders, such as:
 - Donations (size of gift, changes in size of gift, etc.)
 - Involvement with NELP (events, webinar, listserves, mailing lists, etc.)

Current Shared Drive

NELP has always maintained its own systems and has steadily upgraded and replaced our servers over the years; however, due to the increase in staff and additional office locations our current strategy is no longer satisfactory. To accommodate our increase in network traffic and multioffice locations we will need to centralize our current file sharing operations. Current issues:

- **Slow Response time to Shared Drives:** Distance and limited bandwidth contribute to the sluggish response time of our shared drive.
- **Source Control:** We need an effective way to regulate access to documents concurrently

Future Shared Drive (as a result of this project)

Shared Drives with following capabilities...

- Secure connection to shared drives
- Accessible to all NELP locations
- Fast connection to shared drives
- Centralized access shared drives online and offline
- Ability to create multiple level of user access permissions
- Secure Sockets Layer (SSL) and AES-256 bit encryption

Current Computing Environment

Currently all NELP locations are operating in Microsoft Windows environment.

Project Phases: Project is anticipated to be a four-phase project; this RFP is for PHASE ONE.

Phase One will address the various needs to have a multi-purpose central database, which is focused fundraising and consistent tracking. We will also discuss and demo suggested solutions and make a selection.

Phase Two will merge, customize and integrate new Central Database with NELP's databases.

Phase Three will review suggested shared drive solutions and make selection

Phase Four will install, customize and integrate of new Shared Drive on NELP staff computers and devices. Connection testing and monitoring will be conducted during this time.

GOALS:

Primary Goals:

- To have one relational database/accurate source for all donor/funder/member information.
- To have a systematic and streamlined procedure to record all donor/funders/member transactions and activities
- To allow for easy transfer of info between accounting system and relational database
- To consolidate all lists into one relational database (mailing list, email list, memberships, sponsors, board members)
- To have access to database records for all staff from any computer
- To have source control and synchronization of shared files
- To have the ability to access files on multiple platforms
- To have secure, redundant backup of shared drive (encryption)
- To have easy secure access to shared drive for all staff from any computer or device (Secure Sockets Layer (SSL) and AES-256 bit encryption)

Secondary Goals:

- To improve communication with donors/funders/members
- To improve relationship management/communication about donors/funders/members among staff
- To help track progress of various fundraising campaigns and events against benchmarks and due dates
- To have website integration that allows potential partners to enter their contact information which will automatically be entered into our central database for processing. Hopefully convert them to supporting, donating partners
- To know more about our donors/funders/members and their interests.

HIGH LEVEL REQUIREMENTS:

Database Information Functionality:

- Ability to search the contact database by ID, Name, categories and email address.
- Ability to assign constituents to multiple categories (for example donor, board member, sponsor etc.)
- Ability to capture multiple attributes about a contact (project involvement, campaign involvement, etc.)
- Ability to track multiple types of interactions between constituents and NELP (for example, phone calls, emails, attendance at events, etc.)
- Ability to capture all known methods of communication for all constituents (multiple phone numbers, multiple email addresses, multiple addresses, etc.)
- Ability to indicate the preferred method of communication for all constituents.
- Ability to capture the relationships/associations between constituents (i.e. co-workers, business relationships)
- Ability to track when a contact attends an event, responds to solicitations, etc.
- Ability to track donors giving
- Ability to identify donors by different donation levels.
- Ability to identify constituents who are registered members of our online library and whose membership is about to expire.
- Ability to identify new members, renewing members, and non-renewing, and "reminded" members
- Ability to capture membership information for all constituents identified as belonging to the online library category. (For example, membership start-date, membership expiration date, membership category, etc.)
- Ability to capture if a constituent is a business or an individual.
- Ability for the central database to interact with the financial database for consistency of names, constituent information, and to track money paid for donations, membership fees, etc.
- Ability to import data into the constituent database.
- Ability to export data from the constituent database.
- Ability to access constituent information from all computers in every office location. (Mac and PC)
- Ability to access constituent information from remote locations. (For example, staff members working on a computer from home, possibly staff members using a smartphone)
- Ability to restrict access to certain database information based on staff user ID/ job function.

- Ability to backup the constituent information and financial information on a regular basis.

Report Functionality:

- Ability to run custom queries/reports from the constituent database
- Ability to report on who are current donors/funders/members at any point in time
- Ability to create new custom reports from all data available in the constituent database.
- Ability to identify the non-financial implications of fundraising events (for example, the number of new constituents, etc.)

Database Communication Functionality:

- Ability to generate email distribution lists and postal mailing lists from the constituent database based on a specific set of criteria (categories, events, etc.)
- Ability to either interact with our current mass-email provider or to supplant our current mass-email provider at the same level of service or better.
- Ability to automatically generate acknowledgement letters when a donation or a membership donation has been received.
- Ability to send acknowledgement letters to constituents using their preferred communication method (i.e. to send receipts as email attachments, or to print and mail receipts to physical addresses)
- Ability to send membership renewals to constituents using their preferred communication method (i.e. to send receipts as email attachments, or to print and mail receipts to physical addresses)
- Ability to automatically generate membership renewal notices.

Website Functionality

- Ability to keep the email lists generated by the constituent database in sync with the email list used by the e-marketing provider
- Ability to automatically add new sign ups to the email distribution lists and central database
- Ability to accept event applications online and incorporate all data directly into the database

General Functionality:

- Ability to safely and automatically backup the database on a regular basis
- Ability to assign user permissions and roles to prevent “accidental” changes to the database by limiting data access and functionality

Shared Drive Functionality

- Allows fast and secure files sharing
- Ability to collaborate quickly and seamlessly
- Ability to run local backups if shared drive
- Automatically synchronizes data, keeping files up to date
- Ability to share files between multiple computers from anywhere
- Ability to mapped as network drive
- Ability to increase hard drive capacity
- Ability to access files offline
- Ability to store version history of documents
- Ability to quickly restore files from previous versions
- Ability to setup private folders
- Ability to send secure links to other NELP staff
- Ability to create external links
- Ability to create multiple level of user access permissions
- Ability to lock documents being accessed (source control)

CURRENT ISSUES AND DESIRED OUTCOMES:

PHASE ONE (for this RFP)

Problems that need to be addressed in Phase One:

- We do not have a central, multi-relational information source to access accurate, up-to-date information.
- We are currently using Fund EZ, an accounting program that tracks donations that currently does not communicate with our internal database.
- Data is repetitively checked for duplication and accuracy causing an excessive drain on staff time and resources.
- We do not have a clear understanding of the effectiveness of our event or email campaigns.
- Membership processing and donor acknowledgement is time consuming, inefficient, and inconsistent.
- Our calendar and tasks are not systematic.

Phase One Outcomes

- Constituent reports by status, donation amount, category, and relationship to NELP, etc.
- Constituent communications, letters and emails generated from central database
- Produce and distribute quarterly and other mass mailings in a more targeted fashion
- Mailing list with specified parameters downloadable to Excel
- Snapshot on effectiveness of overall promotion efforts, and individual campaigns.
- View of program-wide calendar with key deadlines/benchmarks.

PHASE TWO

Problems that need to be addressed in Phase Two:

- We do not easily capture and stay in touch with those who submit information to the website and so are not able to cultivate relationships

Phase Two Outcomes

- Better communication with site users and hopefully stronger relationships resulting in more donors.
- More detailed information about our constituents will allow us to better direct information and resources of interest to them.

PHASE THREE

Problems that need to be addressed in Phase Three:

- Some staff are not able to easily access shared drives and documents.
- Many staff experience slow downloads/uploads of shared documents.

Phase Two Outcomes

- Easy, reliable, timely file sharing

WHAT TO INCLUDE IN RESPONSE TO RFP

We are looking for assistance in transitioning from our current system, described above, to a single, multi-purpose central database. We will consider solutions which meet our needs that involve either an out-of-the-box software program which can be customized, or a more customized non-proprietary program. We will consider solutions that are either cloud-based or in-house tools or a combination thereof. The scope of work should include:

1. Installing, configuring, and customizing the database platform and shared drive for our use. (This may include providing requirements for any hardware, software, or cloud computing services that may be required.)
2. Guiding the staff in efficient ways to prepare the current database for a smooth transition into the new database. (This may include recommendations for backing up the current data, putting it into a .CSV or Excel format, and importing the current data.)
3. Reviewing any backup procedures for the new database and shared drive(if solution is not cloud-based).
4. Working with the staff to determine how the database should be set up to meet the organization's needs regarding categories, reports, templates, labels, constituents, etc.
5. Setting up the database based on the determinations in #4 above.
6. Designing and testing a set of preliminary reports and letters as specified in "Phase One Outcomes" above.
7. Training the staff on the use of the database and shared drive to address the organization's needs as described herein.
8. Training the staff regarding how to take advantage of available features
9. Developing a written Training Procedure Manual that can be up-dated by staff.

HOW TO RESPOND TO RFP

The deadline for submitting proposals is **January 17, 2012**.

Proposals can be submitted electronically by emailing a Microsoft Word or PDF version of the proposal to:
Bukola Ashaolu, IT Systems Manager
bashaolu@nelp.org

Please include the following information within your proposal:

Brief biography of Your Company or your Work Experience – Why are you the right team to address our database goals?

Client References – Provide contact information for at least two, but preferably three other non-profit clients you have helped in a similar way as our needs describe.

A Brief Description of Your Production Process – Tell us how you would approach this project. This could include tasks such as:

- Requirements gathering
- Writing technical specifications
- Establishment of a "lab" or staging site where progress and work can be viewed,
- Your preferred method of communication (onsite visits, webinars, conference calls, etc.)
- Who will be assigned to our account? (a project manager, developer, strategist, etc?)
- What kind of documentation do you provide (if any)
- What are your expectations of us as a client
- Aside from what we've listed in our functional requirements, what would you recommend?

Estimated Project Kickoff Date – We would like to be using the fully functional central database for Phase One no later than April 16, 2012 and would welcome an earlier completion date. Based on your schedule and current workload, give us an estimate of how soon you could begin the project if we accepted your proposal.

Functionality Specific Quotes

In order to help us understand the work effort involved in completing this project, for the first three High Level Requirements we are seeking: Database Information, Report, and Database Communication functions, please supply the following information:

- Estimated number of hours to complete each feature
- Estimated Cost to complete each feature
- Dependencies – please note any features that may need to be developed together in order to deliver functionality

Proposal Acceptance

All RFP's are due by close of business on **January 17, 2012**.

All proposals submitted will be read and evaluated by our administrative team. Entities submitting the highest ranked proposals will be contacted by the NELP to arrange an interview or demo. This could be in-person or online depending on the geographic location of the proposer.

A final decision will be made after the interview or demo is conducted and all questions have been addressed. The Vendor chosen will be notified no later than **February 16, 2012**.

Questions

Questions about the proposal requirements or the features we are requesting can be directed to: Bukola Ashaolu, IT Systems Manager, bashaolu@nelp.org