

REQUEST FOR PROPOSAL

**WEB SITE and CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM
DESIGN, DEVELOPMENT & HOSTING**



Fulbright Association

February 9, 2010

Introduction to Organization

The Fulbright Association is a private, nonprofit membership organization tax exempt under Section 501(c) (3) of the Internal Revenue Code. Fulbright Association members form the organized constituency who actively support the federal Fulbright Program, an international educational and cultural exchange initiative started in 1948 under legislation introduced by the late Senator J. William Fulbright of Arkansas. The Association's mission is to engage current and former Fulbright exchange participants in lifelong experiences that advance international understanding through volunteer service to communities, people-to-people diplomacy, and dialogue on global issues. Founded by Fulbright alumni in 1977, the Association's diverse membership makes the organization one of the most multidisciplinary, intergenerational, and international nongovernmental organizations in the world.

The Fulbright Association advocates robust federal funding and supportive federal policies for Fulbright and other international exchanges. Through more than 170 programs sponsored annually by 47 chapters in the United States and by the national organization, Association members welcome current Fulbright grantees from abroad and provide them with non-campus-based opportunities for interchange with U.S. alumni, for experiences in their U.S. host communities, and for the person-to-person interactions that build mutual understanding among nations. The Association recognizes biennially individuals who promote international understanding through the J. William Fulbright Prize for International Understanding (awarded in even years) and the Fulbright Lifetime Achievement Medal (awarded in odd years). The Fulbright Association also facilitates communication and networking among approximately 100 sister Fulbright alumni organizations abroad.

The Fulbright Association has an annual budget of approximately \$800,000 and a staff of four full-time professionals. The Association involves more than 500 alumni volunteers in active service through the national Board of Directors (18) and the boards of its 47 local affiliates (approximately 500 volunteers).

Project Goals and Parameters

The Fulbright Association seeks to become exponentially more visible to Fulbright Program participants and alumni worldwide and to increase significantly its membership. To achieve these outcomes, the Board of Directors and staff have determined that the Association must 1) improve its web presence; 2) enhance users' online experiences; and 3) make more effective use of social media.

The Association requests proposals for 1) design, development and implementation of a new web site with a new content management system (CMS); 2) design, development and implementation of a new customer relationship management system (CRM); 3) migration of relevant existing web site content and alumni data currently in a non-web-based relational data base, in a web-based Online Community, and related data in Excel spreadsheets; and 4) training on new systems.

The proposal should take into consideration the following:

- None of the Fulbright Association's four staff members has technical backgrounds, although several are proficient "accidental techies." The new CMS must be easily edited and updated by non-technical staff and volunteers.
- The new CRM must also be easily used by non-technical staff and by volunteers, within data-access permission parameters. The new CRM must also be state-of-the-art in terms of data security and protection of private information.
- The Association provides web pages for its 47 U.S. affiliates, known as chapters. Currently, only a few chapters update content, owing to the difficulty in using the current system. Some have also requested more capacity for chapter web pages.

- Budget constraints have caused elimination of a print newsletter, which has been replaced by a variety of targeted e-communications. The Association would like to develop further its e-communications strategy and needs new systems that support the development and distribution of electronic publications.
- The web site redesign should result in templates and guidelines that can be transferred to or adapted for print materials.
- The Association is developing a social networking strategy to drive users to the Association's website and programming; proposals must address the integration of proposed web site redesign, the CMS, and the CRM with social media tools.
- The proposal should highlight how developers will determine and create navigation schemes that are intuitive and user friendly.

Sample of Objectives

The list of objectives below is illustrative, not exhaustive. Fulbright Association staff expects to discover additional objectives as technology options and solutions are discussed in an iterative process.

- Increase membership through attractive design, easily updated member- and staff-generated content, and easy-to-use e-commerce solutions for joining/renewing membership online
- Provide attractive opportunities for member interaction with the Association and its chapters and for member-to-member interaction
- Enable site users to take action on behalf of the Fulbright Program (send messages to Congress, identify members of Congress, determine members' committee assignments, identify information on local media contacts)
- Offer creative integration with social networking sites and tools
- Provide registration and electronic payment system for national and local events, as well as event utilities, e.g. name tags, registration reports, check-in lists
- Offer attractive e-philanthropy options
- Provide an infrastructure which supports local and national programs through a calendar, event registration, and mapping of where Fulbrighters are located
- Streamline data-entry and improve business practices
- Provide management data by tracking user activities, offering simple-to-use report functions, and providing new tools for connecting and displaying data

Audience

The primary audiences for the Association's redesigned web site are Fulbright alumni and Fulbright program participants, including current U.S. and foreign Fulbright grantees; segments of this primary audience include national board members, chapter leaders, advocates, donors, and participants in Association programs. The secondary audiences are friends and family of Fulbright grantees and alumni, people seeking information on the Fulbright Program and grant opportunities, people in the international education community, and the general public.

Current Website & Database Metrics

The Fulbright Association web site was originally designed and produced in-house in 1997. A major redesign was undertaken in 2003 in conjunction with the development of a member-restricted Online Community (OLC) developed in proprietary software with Harris Connect. Major portions of the website and the OLC are hosted and managed by Harris Connect, which also offers a broadcast email utility (email marketing) as part of its services. The Fulbright Association website is hosted on three servers—

Harris Connect, GoDaddy, and CapWiz. Google Analytics monitors site traffic to the first two servers, and no information is available about the traffic to the last server.

From 7/10/09 to 1/29/10, there were 23,506 visitors to the Fulbright Association web site, with an average of 123.7 visits per day and 60,765 page views. **On average, visitors spend 1:40 minutes on the website.** New visitors comprised 85.28 percent of visitors. 55.60 percent of visitors leave the website after viewing one page.

Overall storage

Documents hosted on the www.fulbrightalumni.org server through HarrisConnect.com

Published pages - 98 pages using 6.1mb

Members only pages - 61 pages using 4.9mb

Admin - 38 pages using 656k

Images - 310 pages using 1.7mb

Documents hosted on the www.fulbright.org server through GoDaddy.com

Total size: 1,800 MB

Total Directories: 507

Total files: 5,507

The Association uses Corel Paradox 11 for its relational database and manages membership, annual fund donations, and conference registration through this non-web-based system. Some data, such as that on recently returned Fulbright grantees and donors to the biennial fund raising event, are maintained separately in Excel spreadsheets. The Fulbright Association OLC through Harris Connect includes over 81,000 records and supports one administrative user.

The Fulbright Association's Paradox 11 database consists of multiple tables linked via one or more keys, such as member ID numbers. There are currently 66,475 records in the database's main name and address table, of which 7,223 are Association members, and 7,445 are donors. Donors and members are not mutually exclusive. Of note regarding records in the Paradox main table:

- 25,245 records have an email address.
- 15,228 records have bad addresses.
- 1,981 records are of individuals known to be deceased.

Breakdown of 2009 Membership by Membership Categories (Dues Rates Vary by Category)

Life Members: 3,370

Individual and Associate (non-alumni) members: 2,231

Retired members: 1,227

Student members: 213

Couple members: 182

Institutional members: 174

In the Paradox database, the dues table includes the type and amount of all dues payments each current or former member has made. This table is linked to the main name-address table by the member ID. A Paradox script links the two tables and is used to pull out the name, address, and expiration dates for member groups whose anniversary renewal date is within specified date ranges. This contact information is merged with the appropriate renewal notice in Word documents. A similar table and script exist for donations. Another key table is the conference table. The main data entry table has a button (script) that registers the person currently displayed in the main form. The new CRM will need to exceed the level of customization currently available for membership, donation, and event management and reporting.

Data Migration

A large amount of existing web content will be migrated. There is also additional imagery to include in the new design. The Association currently has PicasaWeb, Flickr, SmugMug, YouTube, and iTunes accounts for its multimedia online storage. Records in Paradox and the OLC will need to be reconciled and migrated to the new CRM, as well as data on donors and recent Fulbright grantees stored in the Excel spreadsheets referenced above.

Fulbright Association Branding and Graphic Identity

The Fulbright Association logo may only be produced in PMI 280 (#004990), black, or reversed out. The Fulbright Association works in Times New Roman, Arial, and Rage Italic fonts, but is open to exploring new design options.

Web Site Redesign and Features*

Below are our current expectations for the web site redesign.

- Levels of Access – The ability to create different access (administrator) levels to reflect different levels of permission for viewing data and to be readily usable by staff without technical expertise as well as volunteers.
- Visually Appealing – The site must have an attractive mix of text and graphics.
- Adherence to Fulbright Association Graphic Identity Standards and a Common Theme – Each section of the site, including chapter pages, should have a common look and feel. The Fulbright Association logo should be prominently displayed on every page as a common header.
- Consistent Design and Copy – The use of photographs, fonts and layouts should be consistent throughout the site, which should also facilitate frequent copy editing.
- Easy to Navigate – Information should be grouped and presented in a logical manner. We currently see five major content areas: Membership, Chapters, Advocacy, Programs, and the Global Fulbright Network, but the Association is open to suggestions.
- A site-map
- An effective search feature – Need for users to be able to search all web content at once.
- Templates – A suite of templates for chapter e-newsletters, membership announcements, member recruitment drives, action alerts, legislative updates, chapter event invitations, and program-specific initiatives, e.g. Fulbright Prize, annual conference.
- “Members only” section – Create a single-password protected section which allows members to create profiles and search for fellow alumni by Fulbright country, year, field, U.S. region or other parameters. Migrate the existing usernames and passwords to the new web site and CRM; allow users to log in from popular social networking sites.
- Social Media integration – Allow users to post news and events directly to their Twitter, Facebook, and LinkedIn accounts. Also, provide prominence to Fulbright Association accounts on social networking sites.
- Membership utilities – Allow members to renew membership online and provide membership options for alumni interested in joining the Association in one seamless process for user from entering contact and Fulbright information, to paying online, to creating a user account and password.
- E-philanthropy – Messaging, “donate now page” and navigation must be simple, clear, and direct.

- Chapter web pages – Must be easily accessed and updated by volunteers and have functionality for posting photos, creating event announcements, registering for events, and managing e-commerce.
- Events calendar – Calendar which compiles all local, national and international events in one space and that can be easily updated by volunteers.
- E-advocacy system – Allow alumni to enter zip code, identify their representative and senators, electronically deliver messages to members of congress. Maintain a database of elected officials and provide brief profiles of each. Also, allow users to search for media contacts within a geographic area.
- International Fulbright community section – Should include contact information for Fulbright Commissions and sister alumni organizations, with various permission levels so international representatives may update contact information and add events to event calendar
- Links to Fulbright grant administrative organizations – This section should include information about applying for Fulbright grants and provide clever visuals that indicate that the Fulbright Association does NOT administer any of the Fulbright grant programs
- Fulbright Alumni Speakers Bureau section – Provide ability for Fulbright alumni experts to submit photos and bios of themselves to be contacted as speakers; may need to have varying levels of access to such information
- Mapping API – Allow visitors to see geographic areas with greatest density of Fulbright alumni and to see chapter areas.
- Members/staff Blogs
- “About Us” section – Include the history of the Association, board of directors and staff bios, and a contact us form.
- Multi-media Section – Streaming video and audio for national and chapter events; ability to post streaming media/podcasts easily
- News Section and Archives – News releases for the homepage and a directory of archived press releases and announcements.

Constituent Relations Management (CRM) System Development and Features*

- Provide constituent relations management software that tracks member contact information (home, business and seasonal mailing addresses; email addresses; social media sites; home, business and mobile phone numbers; fax number), dues payments; donations; membership type; renewal dates, congressional districts; business title and organization; Fulbright information (year, country, field, host university, type of grant), special relationship to Association, e.g. board membership; and other interactions with the Association, such as advocacy messages sent. More information about specific database field requirements is available upon request.
- Allow users and members to update contact information, but filter all new updates through an administrator to approve before replacing existing information to maintain the Association’s data integrity and privacy.
- Allow members to upload photographs as profile pictures.
- Allow users to determine amount of information visible on their profiles.
- Allow users to set their subscription settings and to opt-out of receiving all emails or any subset of Association communications.

- Various levels of accessibility for users, ranging from administrative, limited, and external user. Limited-access users might be chapter leaders who have the ability to modify chapter specific pages and query member information without making changes to individual records.
- Email marketing capabilities.
- Integrated e-commerce capabilities for membership renewal, donations, event registration and merchandise payment. Ability to match payments to membership records and to automatically attribute payment.
- Provide some form of integration with our accounting software, QuickBooks.
- Automatically generate receipts/thank you letters.
- Provide event management for chapter leaders and Association staff. Events should be broken into the local and national levels. The Fulbright Association's national annual conference takes place over multiple days and includes several special events, which members can choose to attend. The event management software must be able to have the utmost flexibility in allowing administrators to create programs with multiple events and prices.
- Allow users to export events as iCal files and configure online calendar applications to "subscribe" to iCal feeds of public events. Also, allow users to share events to social networking sites.
- Identify constituent's chapter based on zip code and have capability to include one member in multiple chapters based on business/seasonal addresses.
- Advanced tracking capabilities: the system must do the following:
 - Track past membership history and the source from which new members decided to join (market source).
 - Track donation records for all constituents and generate reports based on donor, campaign, and other parameters.
 - Track donation campaigns.
 - Track email marketing and determine if users opened specific emails or clicked on specific links.
 - Track advocacy messages sent per user and by action alert.
 - Track event registrations and previous events attended.
- Strong search capability to find any record based on keyword searches. Also provide more advanced searches across multiple fields, such as searching for all Fulbright alumni who attended the annual conference who were from Ohio and completed their Fulbright grant to Indonesia.

**Training: Fulbright Association staff must be adequately trained in the new website features before deployment of the new site and CSM and CRM systems.*

Timeline

The Fulbright Association must launch its redesigned new site by June 25, 2010. If possible, it would prefer to launch the new CRM in conjunction with the redesigned website.

Budget

The proposed budget must encompass all design, development, production, software and training necessary for creating and maintaining the redesigned web site and the new CRM. Hosting will be addressed separately.

Proposal Guidelines

All proposals should include the following information:

- Executive Summary
- Company Background
- Customer References (at least three, along with relevant website addresses)
- Examples of websites created (at least three), preferably in similar scope
- Examples of CRMs developed and implemented (at least three), preferably similar in scope, including data migration and complexity of data and reporting
- Qualifications and specific roles of the individuals who will be assigned to the Fulbright Association project
- Detailed project plan with timeline and deliverables
- Proposed approach to the requested work and schedule for completing the work
- Detailed Budget, including narrative explaining estimated time, fees, and expenses for set-up, development, deployment, and training costs
- Proposed payment plan
- Explanation of expected fees and expenses for annual maintenance and upkeep

Criteria for Selection

- Technical expertise and experience
- Graphic design capability
- Implementation strategy
- Training plans
- Qualifications of assigned personnel
- Shared vision
- Value for proposed budget
- Experience with international education, similar organizations, and/or associations is highly desirable

Contract Terms

The Fulbright Association will negotiate contract terms upon selection. All contracts are subject to review by Fulbright Association legal counsel, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

Submitting a Proposal

Questions may be submitted **by email only** to Director, External Relations Noelle Said at noelle.said@fulbright.org.

All proposals are due by **5pm EST, Friday, February 19** and should be submitted to Executive Director Jane L. Anderson at jane.anderson@fulbright.org.