

**Got Voice Got Power  
Request for Proposals**

**Organizing, Electoral, and Fundraising Database**

Issued by Emily Jackson  
Executive Director

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**RFP ISSUE DATE: May 15, 2007**

**PROPOSAL DUE DATE: June 15, 2007**

**SUBMITTAL LOCATION:**

Got Voice Got Power  
2341 University Ave, #4C  
St. Paul, MN 55105  
Attn.: Emily Jackson

# **Got Voice Got Power Request for Proposals Organizing, Electoral, and Fundraising Database**

## **INTRODUCTION**

Got Voice Got Power (GVGP) is a membership organization of low-income Minnesotans (welfare recipients, unemployed individuals, low-wage workers, SSI recipients, etc.) collectively working to influence policy change around issues that impact members' lives. The organization currently operates two campaigns (public housing and welfare/ workforce) and three projects (civic engagement, statewide expansion, and global connections) out of two locations (St. Paul and St. Cloud). In addition to the campaign and project work, GVGP actively works to develop the leadership abilities of its members. The bulk of GVGP's membership resides in St. Paul (where we have been building a base since 1994), however, we also have members in St. Cloud (where we started building in 2006) and will soon have members in the Fargo-Moorhead (where we will start building in 2007). Currently, GVGP has a staff of 10 located in 1 office in St. Paul; we will, however, shortly have 2 staff members working in solo-operated offices in other parts of the state.

GVGP is known nationally among organizing groups as having one of the most sophisticated database systems and being one of the most effective groups at integrating database usage into all aspects of its work. While we have been incredibly pleased with our current database for managing our membership base (both their organizing and electoral activity), we are in a need of a new system.

The database needs to be replaced for several reasons:

- Access to the database is currently limited to our St. Paul office. Our 2004 strategic plan called on us to begin a process of **statewide expansion**. We have already begun developing a chapter in the city of St. Cloud and are planning on beginning the development of another chapter in the Fargo-Moorhead area in the summer. Organizers operating out of St. Paul will need access to the database.
- The advancement of our **civic engagement project** has led to the addition of thousands of new records into our database. However, we are unable to easily import voter records and keep these separate from, yet in relation to, our main membership entries. Exporting our files for voter matches is an equally tedious process.
- We have begun processes for **diversifying our fundraising base**, which includes expanding and fine-tuning our work with individual donors as well as our general grassroots fundraising efforts. Our current database can track donations but is incapable of carrying out higher-level functions to facilitate fundraising efforts (e.g. touch of the button mail merges, contribution reports, email blasts, etc.).
- We are moving forward on implementing a **dues-paying structure** among our membership. A new system will be necessary to help us track dues payment and effectively outreach to those whose payment has fallen behind.

- We are currently working to advance our **institutional fundraising tracking mechanisms**. This includes everything from report, Letter of Inquiry, and proposal due dates to contact with program officers, registering checks, etc. Our current database system does not have fields to accommodate all of these tracking needs, nor the ability to run lists of foundations according to data input.

## **CURRENT ENVIRONMENT**

GVGP currently utilizes a combination of FileMaker Pro and ebase as its database management system. Each computer in our St. Paul office has FileMaker Pro installed in it and our internal sharing network allows us each to access and work with the same core database simultaneously.

Our original database was set up by technology support staff from the LINC Project, a project of the National Center for Law and Economic Justice (formerly the Welfare Law Center) that no longer exists. They then trained one of our internal staff members, Andre Smith, to be able to create some fields and templates, and alter the layout of basic reports. We now occasionally get support from staff from the Progressive Technology Project (PTP) and the Tactical Technology Collective.

All other GVGP staff is trained in both data entry and query functions and utilizes the database as an integral part of their work. One staff member has taken on the role of training others regarding the database's usage and is able to alter certain things in the current system when critically necessary.

The system currently supports a database of over 30,000 entries and is constantly growing. Our main office is networked to a central server where our data is currently stored. Our work stations operate in a windows environment (XP, 2000) while our server runs on Linux.

## **GOALS FOR THE NEW DATABASE**

The new database should be able to do the following:

- Retain the data GVGP needs to do its work. Chief among these data are: (1) a comprehensive collection of contact data [address book] for all the sorts of individuals and groups with whom GVGP works, (2) critical data about GVGP member involvement with the organization, (3) records of activity related to foundation funders and individual donors, (4) voter records and voter engagement activity, and more.
- Allow for multiple advanced types of queries that facilitate program evaluation, assessment, and planning (such as people met in given time periods, number of activities individuals have participated in, individuals living in particular districts, etc.)
- Provide a range of useful products, reports, and analyses including such things as mailing labels, membership lists, donation records, membership dues status, etc.
- Be accessible to and usable by all staff members at various locations around the city (in and out of the office) and state (three potential GVGP offices).

- Meet our current needs, needs we are projecting for the near future, and be able to grow to meet needs as they evolve.

In addition, the database should:

- be stable and secure, easy to maintain,
- be easy to use by staff that is not necessarily technologically savvy (that means having touch-of-the button reports available and/ or simple data import and export ability),
- allow for quick searches and queries despite their level complexity (that means not be held up for long periods of time when multiple level searches are being carried out),
- allow for the development of ad hoc, customizable reports and analyses,
- provide appropriate levels of accessibility to the data, based on staff/ member position and responsibilities – particular in regard to “data entry” and “data editing”.

## **GENERAL RFP INFORMATION**

### **Term of Contract**

The initial contract term for the design of the database will be negotiated at the time of contract award.

### **GVGP’s Right to No Award**

GVGP reserves the right to reject all proposals, reject portions of any proposal, or accept the proposal deemed most advantageous to GVGP.

### **Cancellation**

Should the vendor fail to meet the requirements of the contract, GVGP may cancel the contract within thirty (30) days notice and award the remainder of the contract term to the next best vendor.

### **Vendor Selection and Contract Award**

GVGP will conduct the selection and contract award in the following manner:

- This document will be distributed to all interested vendors.
- Proposals will be received and evaluated as described in the RFP. Selected vendors will be asked to demonstrate their proposed software and/ or make oral presentations to GVGP.

### **Schedule for Evaluation and Implementation Process**

RFP distributed to vendors	May 15, 2007
Pre-bid Teleconference	May 21, 2007
Deadline for RFP responses	June 15, 2007
Invitations for formal presentations	June 22, 2007
Vendor demonstrations/ presentations	July 9-10, 2007

Selection of vendor/ contract negotiation	August 1, 2007
Database designed and/ or customized, current data transferred to it, fine-tuning through organizational pilot & feedback	August – November 2007
User training conducted & new database fully operational	December 1, 2007

## **PROPOSAL SUBMITTAL**

Proposals should be submitted, including all supporting documentation, to:

Emily Jackson  
Executive Director  
Got Voice Got Power  
2341 University Ave, #4C  
St. Paul, MN 55105

651-123-3212  
[emily@GVGPaction.org](mailto:emily@GVGPaction.org)

The deadline for proposal submission is: **June 15, 2007**.

Please contact Emily Jackson at 651-123-3212 x 121 or via e-mail at [emily@GVGPaction.org](mailto:emily@GVGPaction.org) or Andre Smith at 651-123-3212 x 105 or at [andre@GVGPaction.org](mailto:andre@GVGPaction.org) with any questions about the RFP.

## **PROPOSAL FORMAT**

To facilitate the evaluation of proposals, vendors should utilize the following proposal format:

### **Cover Letter Referencing the RFP**

Vendor should provide all contact information (including point person for the RFP) in the cover letter.

### **Company Background**

Vendor should provide a brief (one page) company/ organization description, history, number of employees, and financial status.

### **Executive Summary**

Vendor should describe in non-technical terms its client management software, identifying any unique or distinctive features of the software to which the vendor wishes the evaluation committee to give particular attention. Do not include any pricing in this section.

### **Detailed Solution Explanation (Product Overview)**

Vendor should provide detailed explanation of solution being proposed including what the solution would be able to do and answers to how proposed solution will address questions and concerns contained in the RFP.

### **Training and Support Overview**

Vendor should explain both the type of training that will be provided for staff upon implementation and the type of support available over time.

### **Implementation Timeline**

Vendor shall specify the implementation timeline to be followed within the four month proposed period (August – November). If more or less time is necessary, the vendor should explain this here.

### **Proposal Cost**

Vendor shall outline the costs of implementing and supporting the proposed solution. When possible, cost of various elements of the solution should be broken down so that we may decide whether/ not to accept proposal in full or only in part. Cost estimate should also incorporate cost for transferring our existent 30,000+ record database into the new system.

*[All costs incurred by the vendor in preparing the proposal, or costs incurred in any other manner by the vendor in responding to this proposal will be solely the responsibility of the vendor. All materials and documents submitted by the vendors in response to this RFP become the property of GVGP and will not be returned to the vendor.]*

### **Reference/ Customer List**

List at least five (5) organizations/ customers as references. State organization/ company name, address, contact name and telephone numbers, installed and supported software and duration of relationship.

## **BASIS OF AWARD**

The following criteria will be used to evaluate each RFP response:

- ❖ Technical capability
- ❖ Software capability
- ❖ Functionality
- ❖ Vendor support, responsiveness, and follow-up
- ❖ Ease of use
- ❖ Flexibility and ease of product implementation
- ❖ Implementation plan and support
- ❖ Pricing
- ❖ Timely and complete response to RFP
- ❖ Vendor client references
- ❖ Results of requested demonstrations and presentations

## **DATABASE DETAILS**

The database that GVGP is seeking will retain the data that GVGP needs to do its work. These data will be about individuals and organizations connected to GVGP.

### **General Contact Information Maintained**

The database will maintain the following contact information for each individual or group:

- Prefix (Mr., Ms., Miss, Etc.)
- First Name
- Last Name
- Postfix (Jr., Sr., Etc.)
- Title
- Organization
- House/ Building Number
- Street
- Apartment/ Suite Number/ Floor
- City/ Town
- Borough
- State
- Zip Code
- Country
- Home Phone
- Work Phone
- Cell/ Mobile Phone
- Fax Number
- Primary Email
- Secondary Email
- Webpage
- Phone Functionality (functioning, none available, disconnected, wrong number, not in service, etc.)
- Address Functionality (functioning, none available, mail returned, etc.)
- Language Preference (English, Spanish, Etc.)
- Donor Status (current, past, potential)
- Volunteer Interest (yes, no, potential)
- Category (see below)

## Categories of Individuals & Organizations

A number of mutually exclusive categories of individuals and organizations will need to be created:

CONTACT TYPE	EXPLANATION
Low-Income Individual	Low-income individual who has met one of our organizers in the field and signed up to become a part of the organization list. We would like to flag sub-groups of this category such as: sign-up, general member, working member, leader, core leader. We would also like to be able to track information on members such as the campaigns in which they are active, the type of volunteer activities they like to participate in, whether/ not they are current or former public assistance recipients, whether/ not they live in public housing, etc.
Organizations	Organizations that GVGP works with in some capacity. We would like to then be able to sub-categorize groups into categories such as: community-based organization, policy/ research organization, service organization, organizing group, resource, legal, etc. We would also like to be able to flag organizations that are agencies contracted by the city/ state for critical programs such as: WeCARE, Back to Work, BEGIN, etc.
Foundation	Organization that could or does give money to GVGP. We would like to then flag distinctions such as: current funder, pending funder, potential funder, and past funder.
Individual Person	Individual people are those that are not necessarily affiliated with an organization (or also have given us their personal home contact information separate from their organization) but are not low-income.
Public Official	Members of city, state, and federal legislatures, agencies, cabinets, etc. We would like to be able to then flag distinctions such as: elected official, elected staffer, and agency official.
Staff	Contact information for affiliated GVGP staff people. This should be then broken down into current staff, past staff, and interns.

Media	Newspapers, journals, TV and radio stations and reporters and assignment editors associated with these press outlets. We would then like to be able to flag media folks as: general, potential, relationship, etc.
Vendor	These are entities with whom we purchase products from or pay regular bills to. This group also includes consultants whom we contract for services such as childcare and translation/ interpretation. It would be good to be able to flag these latter two categories somehow.

### Functions by Categories

Following is a description of the functions that we will need to be able to tracked or carried out by category defined above:

#### Low-Income Individual:

The following information will need to be maintained regarding our low-income membership:

- **Date Met/ Entered and Edited:** when the person was met and/ or entered into the database *as well as* date that the record was edited;
- **Point of Entry:** where the person was met (welfare center, employment services program, public housing development, etc. – such tracking should be by type of location AND by specific location address – including organization name and address);
- **Entry Approach:** door knocking, walk-in, call-in, street outreach, teach-in, site outreach, public hearing, action, etc.;
- **Critical Demographics:** number of children, race/ ethnicity, education level, birthday (age), etc.;
- **Public Assistance Status:** public assistance recipient, Food Stamp recipient, Medicaid recipient, public housing resident, SSI/ SSDI recipient; we would like to track both current and past public assistance status (in other words, capturing that someone received benefits in the past if/ when they move off of public assistance);
- **Welfare/ Job Center:** the welfare center that a person’s case is assigned to (there are 35 or so sites);
- **Employment Services/ Welfare Program Site:** the service-site a welfare recipient is mandated to attend;
- **Housing Type:** shelter, public housing, Section 8, Mitchell-Lama, private, etc.; within this we would like to be able to also note which public housing development (of 343) or Section 8/ Mitchell-Lama building, etc.
- **Working Status:** not working, WEP/ workfare worker, transitional job participant, part-time worker; full-time worker, etc.; we would like to track both current and past working status items (in other words, capturing that someone was a WEP worker and/ or transitional job participant even after they obtain part- or full-time work);
- **WEP Site:** the location that someone is mandated to work in to “pay off” their benefits,
- **Primary Staff Contact:** a tracking mechanism to denote who on staff met the individual and recruited them to become a member;

- **Membership Level:** sign-up, general member, active member, leader, core leader, Board Member, etc.;
- **Dues Status:** whether/ not the person has paid dues, how much, when they were paid, and when they are next due;
- **Campaign Interest:** welfare, workforce, public housing, affordable housing, accountable development, healthcare, education, other;
- **Volunteer Interest & Activity:** areas of volunteer interest *as well as* actual volunteering (phone banking, outreach, mailing, etc.) should be tracked;
- **Leadership Activity:** facilitated a meeting, gave testimony at public hearing, spoke at press conference, talked to press, etc.;
- **Event Activity:** what events (meetings, actions, etc.) the person attends. Event activity will need to be tracked in such a manner that a specific entry is made for each event (date, event type, event location) and that we can flag whether the person expressed interest in the event, confirmed their interest, and actually attended the event.
- **Contact Info Status:** phone numbers should be able to be flagged as disconnected (DISC) or not in service (NISC) for temporary periods of time and addresses as functioning or not (tracking whether/ not mail was returned to the office).
- **Electoral Information:** The database will also track both affiliated districts of individuals (council, state senate, state assembly, community board) *and* their voting history records. If possible, the database will also be able to track number of times mailings were sent to the individuals, phone calls made, person-to-person contact done at the door, etc. during the electoral project.

For purposes of consistency (to assist with queries later on), when possible, information should be able to be entered through established pull down lists rather than typed in word-for-word.

Ally Organization: Ally organizations' contact information and type of organization will need to be maintained. We should also be able to track ally organization staff's attendance at various events and functions of the organization. If an ally is a donor to the organization, they would need to be flagged in such a way that they could be selected along with the individual persons that are donors.

Foundation: Foundations should be able to be flagged as being current, past, pending, or potential. We should also be able to capture such information as: date(s) Letters of Inquiry are due, date(s) proposals are due, date(s) decisions are made, date(s) reports are due, date of grant start, date of grant completion, date LOI was submitted, date proposal was submitted, date report was submitted, LOI response, proposal response, type of funding (general or project), type of project support (welfare/ workforce, public housing, civic engagement, leadership development, global connections, etc.), amount of grant, etc. If possible, the system will be able to maintain records of past grants so that funding history as well as present status is captured. Additionally, database should be able to track contact with foundations (email, mail, phone, etc.) and any specific notes that need to be maintained regarding the foundation.

Individual Person: The database should be able to track both the event/ activity attendance of individuals as well as their personal donation history. This would include the amount they contributed to the organization, the relevant check number if applicable, the date of the donation, type of activity that motivated the donation (specific donor mailing or specific event), etc. There

should be a way to have contact information track a household record (i.e. husband and wife, partners, home/ work) as opposed to an individual record if appropriate.

Public Official: The database will track basic information about public officials: their positions, districts, affiliations and relationship with GVGP. The database should also be able to track when we have met with particular officials and/ or organized targeted phone calls to them or actions on them. It should also be able to note the committees and positions that the public officials hold that make them particularly important to the organization. If possible, public officials should be able to have two records that are somehow connected – the main governmental office as well as the district office addresses. Additionally, there would be separate space to note various contact people in the office other than the elected: Chief of Staff, Counsel, Legislative Director, Secretary, etc.

Staff: The database should be able to separate out current and former staff and identify the years that the person worked at the organization as well as the type of position they held (organizer, policy, admin, fundraising, consultant, intern, etc.).

Media: The database will track basic information about media sources: their interests, contact people, preferences, and relationship with GVGP. It should be able to track the various times that a media source covered our issues and/ or quoted one of our members. Additionally, we would like to track the number of times that we have talked with the reporter.

Vendor: The database will track basic information about the various vendors that we have including: what services they provide, at what rates, when bills are generally due, etc.

### **Products or Information: Queries, Reports, Print Outs, etc.**

The database will need to provide a means to generate information in the form of screen and paper reports as well as certain products like envelopes, mailing labels, and mail merges.

*We should be able to do the following with information in the database:*

- Sort information in alphabetical order (by last name or first name)
- Sort information in groups by zip code (for bulk mailing purposes)
- Sort information by street address (for walking list purposes...sorting not only by street name but also apartment numbers)

*Standard products necessary include:*

- Address labels
- Name and address text files for mail merge documents
- Phone lists for phone banking (with boxes for reporting wrong numbers, disconnects, not in service, “yes”, “no”, “maybe”, etc.)
- Donor history documents (with name, address, phone and donor history itemized)
- Walking lists for electoral project (with name, address, phone, voting history, etc.)
- Foundation status reports (with name, LOI date(s), report date(s), status, etc.)
- Email list for blasting (either straight from database or easily exportable)

*We'd also like to be able to:*

- Insert mailing label information on pre-made fliers (for instance, a flier that has a space in it for mailing label information being able to print out with different addresses inserted)
- Be able to map addresses in the database (click a button and link to a google map site or hopstop.com to get directions)
- Be able to click a button and search for a missing zipcode to enter into an address (click to a website that has zipcodes perhaps)

*Queries should be possible to a fine-tuned degree, for example:*

- Members met by a particular staff person in a particular time period (between X date and Y date; or after X date)
- Members that attended a single event or multiple events (>3, <2, etc.)
- Members that were interested in a particular event but DID NOT attend the event
- Members that live in a particular District AND attended 3 or more events within the past year
- Members that are interested in one particular campaign or project
- Donors that gave to the organization in the past year
- Donors who gave thru a particular appeal
- Donors that gave a particular amount of money or within a particular range in the past year
- Members that are registered to vote and DID NOT vote in the last election

In terms of queries, we would like to both have some standard queries as well as the ability to create ad-hoc lists and reports using all database fields we would like.

### **Entirely New Functions to Explore**

Our new electoral project has created some additional areas of interest in terms of our database. We are currently considering the use of **bar codes and scanner** to facilitate data entry and would like to know the feasibility of new systems in accommodating this. Additionally, we would like to know about possibilities for having organizers utilize **hand held computer devices** in the field to enter data and then having the ability to upload this information easily into the existent central database. Another consideration is having **phone lists** be viewable on the computer screen while volunteers are making calls, allowing them to enter call status (Yes, No, Maybe, NISC, DISC, WN, CB, Busy, etc.) into the computer screen, and having this information upload into our system. While none of these are currently essential functions for us, we would like to know whether/ not groups responding to this RFP expect to be able to accommodate these needs now or in the future.

### **User Access**

Our current database allows all users the same levels of access. Due to this, we are currently hesitant to allow membership access to the database, for fear of any critical records being mistakenly deleted. For our new database, we would like to explore the idea of varied levels of access both internally (on staff) and externally (among members). For instance, if we were able to allow members to view phone lists online (as stated above) but not enable people in this function to be able to alter any general data information.

## **ADDITIONAL QUESTIONS**

We seek a solution that addresses all or most of the information outlined within this RFP. In order for us to gain clarity about whether/ not the proposal solution would respond to our needs and to what degree, please include answers to the following questions within your submitted proposal:

1. Which of the functions outlined above are **inherent** to the current system that you are proposing and which would need to be built into it? Please specify if you are planning to modify off-the-shelf software or do custom coding.
2. Can your **system be altered** as new needs and concerns arise after system launching?
  - a. In what ways can the system be customized (including both information tracking and list production)?
  - b. What types of alterations will be permissible and feasible to do ourselves onsite versus require additional programmer time and resources?
  - c. If/ when there are standard drop-down lists for some information tracked, will we be able to edit these lists when necessary?
  - d. Will we be able to create/ define new fields for tracking information?
3. What **help features** are built into the system you propose? Are there help features internal to the system or do they all require external assistance for trouble-shooting?
4. Will it be possible to enter **notes** for various interactions with individual people represented in records? Things that are more qualitative and are not captured in a drop down list of options or a check off box series?
5. How are data **exported and imported** from your system? Is this something that we can do easily?
6. How would your system deal with **non-exclusive categories or duplicative records**? While most individuals in our database belong in one category only, there are some individuals that will cross from one category to another – or be listed under different addresses for different functions. Please let us know how your system would manage individuals listed under more than one category (for example, someone listed with two addresses - as a staff person at an ally organization AND as an individual person at their home address) to assure multiple mailings and calls are avoided? How about multiple individuals residing at the same address (for example, avoiding sending 4 mailings to the same address despite the fact that all people need to be listed as separate individuals for tracking purposes)?