



Catalogue for Philanthropy

Website Rebuild and Relaunch RFP

Organization Overview: The Catalogue for Philanthropy(CFP) is a 501(c)3 nonprofit organization based in Washington, DC. The organization serves as the only local guide to giving in the DC metro region and focuses on raising awareness and building capacity for our nonprofit partners. Working exclusively with organizations with smaller budgets, the Catalogue has helped raise over \$40 million during the past 15 years.

Purpose: CFP seeks expertise to rebuild and relaunch our existing technology. The work is mainly focused on the backend of the website; maintaining or upgrading functionality while also improving the user interface for staff and our stakeholders. New features include a robust learning portal for nonprofit partners, a tiered permission level system for site access, increased interoperability with third party vendors, and general upgrades to improve the efficiency of our backend interface. The redesigned website will empower staff and other stakeholders to make changes, manage the site, and generate reports for analysis as needed with reduced reliance on a webmaster

The Catalogue seeks to have the release of the new website no later than **June 30, 2018**.

Visit our current website at www.cfp-dc.org to learn more about the Catalogue.

Three Overall Goals for Project:

The project has three overarching goals that contribute to the project's successful implementation:

- 1. Increase earned revenue:** Support a variety of new earned revenue strategies and services, including CFP model replication to other cities. **Revenue**
- 2. Improve efficiency for staff and external stakeholders:** Decrease the time and resources it takes staff, nonprofits, and other stakeholders to accomplish tasks with CFP. Additionally, increase the ability of staff and other stakeholders to update information, run reports, etc. **Efficiency**
- 3. Deepen trust of external stakeholders:** The improved backend will deepen relationships with nonprofits, donors, and other stakeholders by creating a sense of confidence and reliability. **Trust**

Below are user profiles that represent the various ways our system is currently being used as well as additions or modifications to existing functionality. Uses for each profile are categorized using the above three goals: **Revenue**, **Efficiency**, and **Trust**.

User Profiles

Communications Staff Users:

- We need to...
 - Quickly access our nonprofit partners' website profiles and social media information on our system **Efficiency**
 - Search, sort, and access application data to learn more about our organizations **Efficiency**
 - Direct media sources to archived press releases **Efficiency**
 - View past press releases from CFP and partner nonprofits **Efficiency**
 - Archive past newsletters and make access easy **Efficiency**
 - Send bulk emails to targeted groups with specific messages **Efficiency**
 - Send emails to nonprofits without needing personal contact information (just select organization from drop down and send email) **Efficiency**
 - Access and search nonprofits' photos by organization, issue, or tag **Efficiency**
 - Quickly access a user-friendly search of our nonprofits (predictive text) **Efficiency**
 - Post and upload videos and other media on website **Efficiency**
 - Create curated list of nonprofits, "Landing Pages," for specific events and stakeholders **Efficiency**
 - Access to editable marketing templates for media publications **Efficiency**
 - Incorporate multimedia across communication platforms (email, website, social) **Efficiency**
 - Track statistics on website and from communication outreach **Efficiency**
 - Search nonprofits' impact data **Efficiency**
 - Review and maintain branding across platforms **Trust**
 - Access and update mailing list electronically **Efficiency**

Development Staff Users

- We need to...
 - Be aware of all donations of any type **Efficiency Revenue**
 - See all aspects of donor profile, including contact and donation information **Efficiency**
 - Process all donation types through same platform, including donations to CFP and our partners **Efficiency**
 - See pass-thru donations (to our nonprofit partners) and donations made to CFP in one place **Efficiency**
 - Enter gifts and tie directly to donors and nonprofits **Efficiency**
 - Seamlessly access data through Salesforce, website, and payment processing platform, with data updating automatically across platforms **Efficiency**
 - Review and maintain branding across platforms **Trust**
 - Search donors by any of their information **Efficiency**
 - Run reports on giving, nonprofits, and nonprofit impact **Efficiency**
 - Track donor activity on website **Efficiency**
 - Track constituents regardless of type (volunteer, reviewer, donor, nonprofit partner) **Efficiency**
 - Create “Landing Pages” for Corporate Sponsors, Giving Circles, other stakeholders **Revenue**

Program Staff Users

- We need to...
 - Follow up with nonprofits about events, deadlines, and reminders **Efficiency**
 - Run reports across nonprofits (leverage, impact, attendance) **Efficiency**
 - Upload online resources for nonprofits to the portal **Efficiency Revenue**
 - Track attendance and registration for events/workshops **Efficiency**
 - Find nonprofit information in one place, quickly from all sources **Efficiency**
 - Send targeted nonprofit emails to specific groups (by year, social issue, budget size, etc.) **Efficiency**
 - List events for nonprofits partners with information specific to each (pricing, etc.), and allow for registration **Efficiency Revenue**
 - Recruit veteran and new reviewers **Efficiency Trust**

Program Staff Users (continued)

- Assign reviewers to organizations for evaluation and vetting, keeping numbers of applications to 10-12 and balancing expertise on teams **Efficiency Trust**
- Track reviewer progress (and recruit additional help as needed) **Efficiency**
- Track volunteers matched to our nonprofit partners **Efficiency Trust Revenue**
- Update nonprofit partner info as needed **Efficiency**

Operations Users

- We need to...
 - Communicate with select nonprofit groups over email **Efficiency**
 - Transfer funds to nonprofits routinely, securely, and quickly **Efficiency Trust**
 - Collect and transfer information between the website and accounting software **Efficiency**
 - Update nonprofit contact information as needed **Efficiency**
 - Match and view donors who found a nonprofit partner through CFP (Compare reported donors from nonprofit partners to our previous online donors and mailing lists) **Efficiency**
 - Allow for nonprofit partners to easily upload reports **Efficiency**
 - Identify lapses in "reported donations" to facilitate contacting nonprofit partners about donor's giving history **Efficiency Trust**
 - Create editable online application that can be adjusted yearly **Efficiency Trust**
 - Manage and track nonprofits through application cycle **Efficiency Trust**
 - Quickly access summary statistics on giving impact **Efficiency Trust**
 - Quickly access application data (geographic location, budget, etc.) **Efficiency**
 - View nonprofit updates to the website including contact information, events, financial snapshot, and all other links on nonprofit pages **Efficiency**



Satellite Users (*Catalogue replication to other cities*)

- We need to...
 - Access the CFP database and back-end tools to manage nonprofit partners in a particular city or region **Efficiency**
 - Customize CFP marketing materials for my region **Efficiency Revenue**
 - Run local reports on our nonprofits, donors, and reviewers **Efficiency Trust**
 - Manage the application process and upload reviewer information **Efficiency Trust**
 - Access tools to design and publish print and on-line versions of Catalogue **Efficiency Revenue**
 - Access CFP training materials and register and pay for in-person facilitators and online webinars **Efficiency Revenue**

CFP Nonprofit Partner Users

- We need to...
 - Fulfill CFP reporting requirements **Efficiency**
 - Access donor information for those who gave to us through CFP **Trust**
 - Access online professional development resources **Efficiency Revenue**
 - Receive online donations through the CFP portal **Efficiency**
 - Edit and access our online portal information **Efficiency**
 - Download and customize marketing materials **Efficiency Revenue**
 - Update our impact and other data on CFP's website portal **Efficiency**
 - Quickly view and register for workshops and events **Revenue Efficiency**
 - Talk with peers electronically to ask and answer questions **Trust**
 - Post jobs and volunteer opportunities **Trust Revenue**
 - Promote events our organization is hosting **Trust**
 - Share information easily with CFP staff about events and social media posts **Efficiency**
 - Recruit volunteers for our organization, including Board members **Efficiency Trust**
 - View and update how the CFP partnership has benefitted my organization **Trust**
 - Get donation payouts quickly from CFP for my organization **Efficiency Trust**

Non-CFP Nonprofit Users

- We need to...
 - Access trainings and workshops and easily register and pay **Revenue**
 - Understand eligibility guidelines and determine if my organization should apply **Trust**
 - Easily access and pay for Learning Commons offerings **Revenue**
 - Apply to CFP quickly and easily **Efficiency**
 - Access public resources on the website **Trust Efficiency**
 - Learn more about CFP **Trust**

Reviewers

- We need to...
 - Sign-up and update information easily **Efficiency**
 - Access assigned applications easily **Efficiency**
 - View other applications beyond those assigned **Efficiency**
 - Know my deadlines and the steps of the review process **Efficiency**
 - Renew for next year's review cycle **Efficiency**
 - Sign up to do site visits for nonprofit applicants if requested **Efficiency**
 - Record my evaluations (ratings and comments) on the program review
 - Record my financial review assessment to make it accessible for final selection process **Efficiency**

Volunteers *(Individuals interested to volunteer at CFP nonprofit partner)*

- We need to...
 - Easily find volunteer opportunities with a variety of search parameters **Efficiency**
 - Contact nonprofits directly about volunteer opportunities **Efficiency**
 - Find board opportunities that are appropriate for me **Efficiency**
 - Share publicly that I volunteered or will be volunteering **Trust**
 - Have a secure sign-up process **Trust**
 - Enter my personal information one-time and access it when I sign-in **Trust Efficiency**
 - Sign up for multiple volunteer opportunities **Efficiency**
 - Share feedback on my volunteering experience **Trust**

Learning Commons Users and Customers

- We need to...
 - View available products and services easily **Efficiency**
 - Order, schedule, and pay (if required) online securely **Revenue Trust**
 - View information about facilitators **Efficiency**
 - Know who to contact with questions about the products and services **Revenue Trust**
 - See reviews about the products and share feedback on my experience **Revenue Trust**

Donors

Giving to Nonprofit Partners:

- We need to...
 - Use a secure process to make donations **Trust**
 - See the benefits and impact of making a donation **Trust**
 - Access tax information online after donating **Efficiency**
 - Give to multiple organizations at once **Efficiency**
 - Share information about support publicly on social media and elsewhere **Efficiency**
 - Rely on the CFP portal to recommend nonprofits to support **Efficiency Trust**
 - Make a donation with a simple and quick checkout process **Efficiency Trust**
 - Find organizations and make donations
 - Donate to an organization I already know
 - Donate to an organization that I don't know but falls in a specific interest area or meets certain criteria (social issue, location, budget size)
 - Donate to an organization and also to CFP
 - Donate directly to CFP
 - Explore and compare nonprofits **Efficiency**
 - Believe my gift is valued and appreciated **Trust**



Giving to CFP:

- We need to...
 - Believe my gift is valued and appreciated **Trust**
 - Understand the impact of my gift **Trust**
 - Donate easily and efficiently **Trust** **Efficiency**
 - Share the news of my gift with others via social media and elsewhere **Efficiency**
 - Access my tax information **Trust**

Public

- We need to...
 - View past newsletters, blogs, and easily navigate CFP website **Trust**
 - Learn how and where to donate **Efficiency**
 - Search CFP organizations quickly with a variety of parameters **Trust**
 - Learn about local issues and organizations working to address them **Trust**
 - Look for services from a nonprofit **Efficiency**
 - Find and review basic CFP information **Trust**
 - View aggregate stats on CFP nonprofits **Trust**
 - Search for and apply to jobs at CFP or partner organizations **Efficiency**

Partner Selection, Print Catalogue Production and Website Refresh

- We need to:
 - Use ratings/comments for final selection decisions **Efficiency** **Trust**
 - Record category and placement in print Catalogue **Efficiency**
 - Collect feedback from “re-featured” nonprofits on existing write-ups **Efficiency**
 - Track stages of editing process and archive progress until finalized **Efficiency**
 - Send alerts or notifications if workflow steps are overdue **Efficiency**
 - Collect, select, and tag photos from nonprofit partners for both print and web **Efficiency**
 - Have finalized descriptions and photos auto-populate to nonprofit portal pages **Efficiency**
 - Automatic syncing of nonprofit partner data to CFP profile **Efficiency**
 - Easy editing of all webpages by staff **Efficiency**



Eligibility Requirements:

- Proven track record of successfully designing, developing, and implementing websites (new and revised)
- Deep understanding of existing third-party software and vendors that can be integrated into a system to increase functionality and efficiency, minimizing customization.
- Experience working with organizations (such as membership or foundations) that have many users and complex workflows (e.g., applications, donation, capacity-building portal, etc.).

Application Submission:

Qualified applicants must submit the following to by 5 pm on January 19th, 2018 to Bob Wittig, Executive Director, at bwittig@cfp-dc.org:

1. Cover letter that details applicable experience which aligns with the Catalogue's web redesign goals.
2. Outline of proposed scope of work and timeline (goal is to launch new site by 6/30/18) that includes process to redesign, develop, and implement website upgrade as detailed by the user profiles listed above. Please also include any strategies or approaches that will be used to ensure a quality, final product that will meet the Catalogue's goals and be consistent with its brand.
3. Cost to execute your scope of work.
4. Resumes of individuals who will be working on this project.
5. Three client/customer references.

If you have any questions, please email Bob Wittig at bwittig@cfp-dc.org.