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Jackson River Proposal

Presented to



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# Executive Summary

We are excited to present ecoAmerica with our proposal for Salesforce implementation and website integration support. Since our company’s inception in 2008 we have been at the forefront of implementing and integrating Salesforce with Drupal based websites, email service providers and other applications to support the online fundraising, marketing and program work of nonprofit organizations.

## What We’re Proposing

We propose that ecoAmerica move forward in a phased Salesforce implementation approach to support the MomentUs launch (currently scheduled for March 21st).

## What’s in our Proposal

Within this proposal we will address ecoAmerica’s specific requirements and how they translate from a SaaS solution to a best of breed model and we will provide more information on the features, benefits, and architecture of Springboard. We welcome the opportunity to discuss Springboard in more detail, and to provide a demonstration of the power that comes with a best of breed approach, developed by industry experts and adopted by the most innovative online nonprofits.

If you have any questions or comments, please feel free to contact us directly.

Sincerely,

TJ Griffin, Partner and Co-Founder

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# Our Understanding of Your Needs

In the last two weeks of January 2014 we conducted high level conversations both with your staff and your technology partner EchoDitto. As a result of those conversations we’ve been able to gather the following high level goals for your project:

## Salesforce must be in place to support MomentUs at launch and as the program evolves

The most critical aspect of this implementation both in terms of time sensitivity as well as functionality is centered around the support for the MomentUs project. Our current understanding of this project and how it relates to Salesforce is as follows:

* MomentUs will be comprised of a series of websites focused on organizing institutions and individuals within six specific community sectors with the goal of increased institutional and public support to help America become better prepared to minimize the risks and maximize opportunities of changing climate.
* The primary goals of the CRM application are:
  + capture information of individuals and organizations (along with their respective roles)
  + track their progress on their site specific to-do lists and site interactions
  + allow ecoAmerica to push out next steps (ideally in an automated style) related to their to do list progress and online interactions
  + infuse ecoAmerica’s online and offline marketing program with useful segmentation information
  + natively integrate with both the MomentUs family of sites as well as ecoAmerica’s email service provider of choice
* The data architecture must be well defined but flexible to support the core needs of the sites as launch as well as anticipated needs in the future
  + For instance, the faith based site may collect a “denomination” field, while other sites may not collect that field.
  + Future interactions outside of the to-do list may become necessary to track and ecoAmerica will need a systemic way to capture those interactions, be able to segment on them and potentially provide automated marketing around those similar to the to-do list
* The information collected from the MomentUs sites must be combined with current information held within ecoAmerica and provide a holistic view of institutions and individuals

## Salesforce must become the database of record for all of ecoAmerica and the application architecture must support the needs of the organization as a whole

EcoAmerica has two existing Salesforce instances that are targeted to support separate pieces of ecoAmerica’s program. The longer lived instance is predominantly focused on high dollar individual and institutional giving. The more recently created instance is designed for supporting the MomentUs project. Due to deficiencies in both data structure and functionality there are also a series of spreadsheets where ecoAmerica is tracking information about organizations, individuals, gifts and other interactions.

The goal of the CRM build must include a process for combining these instances, folding in any external spreadsheets or outlier data stores and building a structure that supports current (and forseeable future) development, marketing and programmatic needs within the organization.

## ecoAmerica must have a partner they can rely upon for training, support and assisting in growing the platform as the organization’s needs evolve

Without a fully supported instance, trained Administrators and the ability to evolve the platform, the CRM project will not be successful. As a result, ecoAmerica needs a partner that can help define a solution that meets the short term needs, train administrators to use that system and build a flexible solution that can grow as ecoAmerica’s needs evolve.

At Jackson River we pride ourselves on being a great long term partner and have built our business on our reputation on being smart, fun to work with and available when our clients need us most.

# Our Recommendations

## Prepare the new Salesforce MomentUs Instance for the ideal future state

We recommend focusing build efforts in the new instance of Salesforce as the old development instance has an outdated version of the Nonprofit Starter Pack. This approach will require installing and configuring the Nonprofit Starter Pack in the new instance and updating existing data within that instance to match the new data structure. This approach is essentially starting from scratch, but given the current environment we don’t feel like salvaging the old instance makes much sense. This goal would need to be complete prior to launch of the site.

## Assist EchoDitto in defining the integration architecture and automation required for the MomentUs launch

During our discussions in January it became apparent that the integration architecture and requirements are still in a state of flux. Part of our role in this project will be to assist in nailing down those requirements (which may include pushing “nice to have” requirements to future phases) as well as potentially assisting in developing the integration layer itself.

In addition we will assist in defining and implementing the automation that will power the to-do list follow ups in Salesforce (specifically, messages that may be sent to individuals pushing them to complete their to-do list, reminders for to-do list items and congratulatory messages when milestones are complete).

## Decommission the old development Salesforce instance and migrate to the new state

We recommend migrating all of the data and functionality into the more recently established Salesforce instance (which we’re referring to as the “new MomentUs Instance”. This includes data mapping and migration, recreation of any critical business functions and features as well as resolving any current limitations of the old instance.

As part of this migration we will also fold in any external data sources that need to be migrated into the new Salesforce environment and provide a full data map prior to that migration. The migration step will also include data scrubbing and deduping.

## Train and Support ecoAmerica staff on the new Salesforce paradigm

Each phase of the project will include a training component which include screencasts and documentation where appropriate. We also recommend that at least one person from ecoAmerica attend Salesforce training at the discounted nonprofit rate. In addition, you may sign up for free at forcify.me for our training videos focused on the Nonprofit Starter Pack.

# Our Approach

## Discovery

Given the timeline, the discovery will be brief and focused on the following goals:

1. Define the minimum viable product to support the MomentUs launch
2. Define the future state CRM, specifically highlighting areas that must be in place for Phase 1 launch
3. Define data maintenance tasks needed
4. Determine scope of Jackson River involvement in integration
5. Finalize current scope and estimates and produce phase 1 implementation statement of work
6. Prototype solutions as needed to clarify functionality and define various approaches to specific problems

## Phase 1 Implementation

1. Implement the minimum viable product as defined in Discovery including
   1. Object and field definition
   2. Workflow rules and automation to power online marketing
   3. Email service provider integration and consulting
   4. Reporting and dashboards to support MomentUs
2. Assist in website integration as defined in Discovery
3. Port existing data to the new data structure
4. Develop the underpinning for the future CRM
   1. Establish the core Nonprofit Starter Pack implementation and configuration
   2. Begin the data mapping process for phase 2

## Phase 2 Implementation

1. Port the old development SF instance to the new SF instance
   1. Complete data mapping
   2. Establish any remaining field and object definition
   3. Create additional workflow rules and automation as necessary
   4. Migrate the data
   5. Decommission the old instance
2. Establish reporting and dashboards
3. Configure permissions and any additional application integration
4. Develop roadmap for anticipated future needs

## Training, Support and Launch

1. Train staff at milestones within each phase
2. Document custom code and/or configuration as needed
3. Provide both run-time and post launch support as needed

# Budget and Timeframe

### Implementation Estimate

The bulk of the implementation costs will be defined by discovery. Based on similar CRM implementation projects, we expect that the CRM side will fall between 200 and 300 hours, give or take. The wide swing in hours in Phase 1 is currently under-defined nature of both the integration needs and our role in the integration project. Our focus in Discovery (as mentioned above) will be to finalize those requirements and our role as it relates to what is needed to integrate the sites with the CRM.

|  |  |  |
| --- | --- | --- |
| **Task** | **Hours** | **Cost** |
| Discovery | 40 | $8,000 |
| **Phase 1** |  |  |
| Project and Account Management | 20 - 40 | $4,000 – 8,000 |
| Salesforce Configuration | 20 – 60 | $4,000 – 12,000 |
| Data Manipulation and Migration | 20 - 40 | $4,000 – 8,000 |
| Website Integration Support | 20 - 100 | $4,000 – 20,000 |
| **Total Phase 1** | **80 - 240** | **$16,000 – 48,000** |
| **Phase 2** |  |  |
| Project and Account Management | 20 - 40 | $4,000 – 8,000 |
| Salesforce Configuration | 40 – 60 | $8,000 – 12,000 |
| Data Migration | 40 - 60 | $8,000 – 12,000 |
| **Total Phase 2** | **100 – 200** | **$20,000 – 40,000** |
| Training and support | TBD | Time and Materials |
| **Total Estimated Implementation Cost** | **220 - 480** | **$44,000 – 96,000** |

### Project Timeline

Based on the information we have out our disposal, the March 21st launch date doesn’t seem a realistic goal to get both the work done needed to provide the foundation for the future CRM instance and the integration given the state of apparent flux of the requirements. That said, we feel it prudent to proceed with discovery before committing to or pushing that date. We are currently estimating that the first phase will take somewhere between 7 and 12 weeks (including discovery) to complete.

|  |  |
| --- | --- |
| **Task** | **Weeks to complete** |
| Discovery | 1-2 |
| Phase 1 | 6-10 |
| Phase 2 | 8-12 |
| Total Number of Weeks | 15 - 24 |

# Appendix A: About Jackson River

Jackson River is a Washington, DC-based technology consulting firm that works with select influential non-profits, cause-based initiatives, and progressive foundations. Our purpose is to support and strengthen organizations doing good work in the world by using technology to enhance the impact of a cause.

## Our Philosophy

We believe that the right technology can change the world – when it is understood as one element in an organization’s greater ecosystem, operating in service of your long-term success. When you work with Jackson River, your team begins every project from this big-picture organizational view, understanding your structure, capabilities, business processes, marketing objectives and strategic goals, in addition to your technology infrastructure. As a result, Jackson River offers your organization both technology and a partnership that:

* reflects a “best of breed” approach in terms of technology and industry expertise;
* is fitted around your needs (rather than you having to adapt to it);
* integrates beautifully with your other technologies and partnerships; and
* your staff are prepared to leverage with increasing sophistication for many years.

## Our Experience

Jackson River was founded by three veterans of the nonprofit technology, marketing, and strategy world. In 2008, we saw a critical need to help organizations harness the power of open-source and best-of-breed technologies to do good work in the world. As we’ve grown, we’ve built a team of experts that includes direct nonprofit experience; cause marketing expertise; technical experience with applications and websites for nonprofits; and the nonprofit software industry.

Both our software and staff are steeped in the broader context within which organizations are challenged today. Our solutions are informed by:

* The latest in supporter **engagement strategies** and tactics
* The ever-changinglandscape of **technology and tools**
* The diverse **operational models** of different types of nonprofits

## Our Team

When you work with Jackson River, you get a team that:

### ****Is Smart and Helpful.****

We strive to be full partners in your success, and are always on the lookout for new ideas and perspectives that your organization might bring to bear. Our clients tend to ask us to the table early in a project, to help think through how best to integrate strategy with technology.

### Plays Well With Others.

Because we support our clients throughout an initiative, we frequently partner with design firms, strategy consultants, PR agencies and other technology shops. We appreciate the new ideas and new ways of thinking that a collaborative approach offers, and take a “check your ego at the door” approach.

### Knows Technology, But Thinks Like Marketers Do.

We’re technology geeks, social and mobile experts, testers and data heads, and advocacy and fundraising people. Most of all, we’re consultants who are rooted in the goals that matter most: building and growing supporter engagement; maximizing conversion and revenue; increasing a sustainer base; reaching supporters in more channels and contexts; and doing all this with increasing effectiveness over time.

### Communicates Well and Often.

We believe that the key to success in every initiative is clear and effective communication. Our style is infused with humor, in service of building strong working relationships; collaborating effectively; keeping everyone focused on the same goals; and getting the job done on time and within budget.

### Balances Quality and Efficiency.

We work smart, and we work hard. Our commitment is to deliver top-notch technical solutions to our clients while also respecting the very real budget and timeline constraints that they face as nonprofit organizations.

### Is Everywhere (Just Like Our Clients Are).

While we’re based out of Washington, DC, our staff are located across the country. As a distributed organization, we frequently travel to wherever our clients need us. We’re also skilled at remote collaboration, using technology to run complex projects across distances.

### Will Love Your Cause As Much As You Do.

You believe passionately in the work your organization is doing. We do too. Our staff choose a career with Jackson River in order to work with some of the most extraordinary causes in the progressive sector. We get on board with your mission, and commit to making your technology use a success. We want you to be happy *and* effective.

# Appendix B: Selected Client List

Jackson River has provided technology consulting, web development, training and implementation and integration work for a wide range of progressive organizations.

***100% of our work is from referrals from existing clients or current strategic partners.***

ACLU  
AFL-CIO  
American Constitution Society   
American Jewish World Service

American Society for the Prevention of Cruelty to Animals  
Amnesty USA   
Aspen Institute  
Audubon Society  
Conservation International

Defenders of Wildlife

George Lucas Education Foundation

International Center for Research on Women

International Fund for Animal Welfare  
International Rescue Committee

Marfan Foundation

Minnesota Public Radio/American Public Media

National Public Radio

Office of the Democratic Whip, Steny Hoyer

Opportunity Agenda   
People for the American Way

Planned Parenthood Federation of America

San Francisco SPCA

Save the Bay

Southern Poverty Law Center  
Student Conservation Association

The Pew Charitable Trusts

Union for Reform Judaism

U.S. Fund for UNICEF  
Wallace Global Fund

# Appendix C: Our Capabilities

  
At Jackson River, we’ve lived and breathed every stage of the nonprofit lifecycle: from technology strategy to organizational development, from mission-driven work to supporter engagement, from online to offline communications, from RFP to finished product. Although our primary charge is the effective selection and implementation of marketing technologies, a big-picture perspective on organizational success is embedded in our DNA.

Our clients engage us to help them with a diverse array of strategic and technical work. We regularly support organizations with:

## Technology Assessment & Strategy

**Services Include:**• Stakeholder interviews

• Organizational resource analysis

• Current toolset assessment

• Technology recommendations

• Actionable rollout plan

• Staffing & process strategy

Because of our commitment to both best-of-breed and open source technologies, organizations often ask us to help recommend a comprehensive set of solutions beyond online marketing and fundraising. We bring all of our industry knowledge to bear in assessing your organization’s model, staffing and skillset, legacy toolset, strategic objectives, and the current challenges to your growth, and then recommend a combination of solutions that can be tailored for your precise needs.

## Springboard Implementation

**Services Include:**

• Technical solution design

• Donation form buildout

• Engagement form buildout

• CRM integration

• Custom dashboard development

• Phased plan for marketing growth

While Springboard is a truly open-source solution, many organizations who choose Springboard as their online marketing and fundraising solution also choose to work with us as their implementation partner. We get each organization up and running with an advanced set of supporter engagement forms, as well as deep CRM integration, tailoring each setup around an org’s unique priorities for social and mobile marketing, sustainer engagement, analytics and measurement, and other core objectives.

## Website & Campaign Development

**Services Include:**

• Full web presence

• Microsites

• Mobile sites

• Email campaigns

• Social campaigns and apps

• Custom interactions

• Cross-channel campaigns

• Source code and analytics tracking

Many organizations tackle software implementations and major online initiatives such as website redesigns at the same time. A significant amount of our development work involves building websites, microsites, mobile sites, email campaigns, social campaigns and apps, custom interactions, cross-channel campaigns, and the tracking mechanisms that tie all of these critical pieces together into one integrated view. Our developers are adept at translating your designs into effective code that leverages the best of what your CMS and Springboard have to offer.

## CRM Implementation, Integration & Data Migration

**Services Include:**

• Salesforce Implementation

• Data Migration

• Offline database integration

• Donor database integration

• Custom application integration

• Integration with 3rd-party CMSes

• Website content migration

• Standard & custom tool integrations

Our work focuses extensively on moving data and content between all of the places you need it to reside. Our technical strategy maps the entire landscape of your data, including all of the ways that you might want to leverage data in the future. Once we have the full picture, we identify the best ways to transit data between systems, plug the pieces together, help you format and migrate any data or content, test its movement, and then make sure you can access that data to create insight and meaning.

## Analytics & Reporting

**Services Include:**

• Implementing analytics tracking

• Source code strategy

• Custom reporting & dashboards

• Benchmarking

• Data warehousing & reporting

We take the long view of translating supporter activity and behavior into meaningful, actionable information. This includes creating a unified vision across systems, employing tracking and measurement tools like Springboard’s built-in source coding, web analytics tools like Google Analytics and Ecommerce tracking, industry testing and tracking tools like KISS Metrics, and configuring your Springboard, Salesforce, and other databases to serve up all the data you need in a ready-to-use format.

## Optimization & Training

**Services Include:**

• Multivariate testing

• Integrating other testing tools

• Campaign performance analysis

• Benchmarking results

• Recommending growth tactics

• Training internal staff

• Developing Springboard features

Once our clients launch an initiative, they have all of the tools and data they need to succeed. However, turning data into insight, insight into action, and action into growth can be an intensive process, and many organizations look to Jackson River as a long-term partner optimize their efforts. Sometimes this takes the form of helping their internal staff through process development, training, documentation, or prioritization exercises. At other times, this involves helping clients advance their marketing efforts by suggesting multivariate tests, developing a new technical function or feature to measure a program’s effectiveness, identifying other testing tools or protocols, evaluating the performance of a specific initiative, or recommending ways to optimize content and data to better engage and convert supporters.

# Appendix D: Our Process

Although specific activities and deliverables will depend on the nature of the project, we always work in a highly collaborative fashion with our clients to ensure that we’re delivering what you need, when you need it, and within your organization’s budget. Regardless of scale or scope, all of our projects follow the same comprehensive methodology:

**Discover & Design**

Our first order of business is to get embedded in your organization – to learn about who your team is, how you work, the breadth of what you’re trying to accomplish, and how best for us to align around your goals. Once we’re thinking like members of your team, we then design both a project approach and a technical solution.

The **project approach** encompasses the working plan that will get our joint teams from conception to launch, including a finalized budget and scope; detailed project timeline; clear-cut areas of responsibility; and recommended communication, sharing, and tracking tools to best facilitate our collaboration.

The **technical solution** is our map for developing and integrating all of the complex pieces of your technology puzzle. To be successful, you’ll need deep integration, intuitive workflows, pixel-perfect implementation, and rock solid reporting. We work with you to architect end-to-end solutions that translate the creative to the functional, map the flow of data, and spec out any needed custom development.

**Develop & Integrate**

While our end-to-end process involves discrete milestones and checkpoints, during the Develop stage, we tend to follow a more “agile” process, in order to give your team many opportunities for input. We ask our clients to play an active role as reviewers and collaborators during this phase, to make sure that we’re achieving the vision mapped together during the Design phase.

As development progresses, we turn our attention to a parallel set of processes – getting all of your systems to connect. Our job is to uncover and project all the ways in which you might want to view, use, and manipulate your data, and to create easy integration and robust reporting that you can build on over time.

We believe that training is an ongoing activity that helps organizations take increasing ownership of the toolset and grow the ways they leverage Springboard over time. We start training early in our projects by helping key staff to understand the conceptual model of Springboard. As a project progresses, we shift our training activities to a more role-based approach that involves short, webcast training sessions on topics customized by task.

**Train & Enable**

Because we’ve found over the years that a “train the trainer” approach works best, we also do deep-dive training with one or more of your staff, giving them an expert level of knowledge. When a need for additional training arises, whether through staff turnover, change in roles, or a desire to go deeper with the tools, you can either utilize your in-house expert, or call on your Jackson River team. We also connect clients with a vast repository of free resources to help them extend their knowledge of Salesforce (including our own videos on Forcify.me: <http://www.forcify.me/>), and interesting best practices.

**Verify & Launch**

Once development and integration are complete, we enter an intensive verification period, with a heavy focus on quality assurance (QA) and user acceptance testing (UAT). While we take the lead in testing, the Verify phase is a collaborative process between our team and yours, which may also involve your design partner or other service providers. Behind the scenes, we go through a period of testing every possible data flow to make sure the data is transmitting and landing securely.

When it’s time to launch, our approach is “all hands on deck” – for both our staff and yours. We make sure that all priority issues are resolved and signed off on by your team, and then work together to perform the necessary switches to make your project accessible to the world. We follow a master launch checklist that’s tailored to the division of labor agreed upon by our teams, to ensure that we’ve addressed every small contingency for a smooth launch.

While launch is an important milestone, we believe that it’s just the beginning of our work together. As your team stabilizes with your new toolset, your project team and our Support group are here to help with the transition. We find that our Support work typically begins with lots of how-to questions, and over time evolves into more in-depth support around how to extend the Springboard product, or address a business problem, or help expand your team’s skillset.

**Support & Grow**

## Project Leadership & Communication

At Jackson River, our project managers (PMs) are strategists, nonprofit experts, and most of all trusted consultants who will know every nook and cranny of your project. Our PMs also tend to be CMS-experienced, Salesforce-expert, all-around great resources with lots of industry perspective to offer your team. Your PM will use a variety of tools during the project to facilitate clear communication, team member collaboration, and of course a project that is on time, within budget, and of the highest quality. Our standard project tools include:

**Project Oversight & Tracking: Assembla**

**All of our project activity is centrally managed through Assembla, a collaborative “workspace” tool that we use for both our build projects and ongoing support. During a project, we use an Assembla wiki to keep centralized links to all project documents as well as assigning and communicating about individual tasks for each of our team members and yours.**

**We also use:**

**Project Planning: Microsoft Project/OmniPlan/Excel**

Every project has a project plan that includes a detailed task list, dependencies between activities, ownership, and a master schedule. Depending on what works best for your team, we will use one of several project planning tools to create and manage the plan, and then share it with you weekly via Assembla, so that you always have the bird’s eye and ground-level view of our progress.

**Time Tracking: Harvest**

We use Harvest to detail our time on projects and keep them on budget. We track our time daily, which means that your PM always has up-to-date insight on how many hours we’re spending on which activities. We’ll provide a weekly update in each check-in call, but can also produce real-time reports to evaluate budget tracking on a moment’s notice.

While a typical Jackson River project might employ some or all of these communication channels, we’re flexible. Frequently an organization’s design agency might choose to use a collaboration tool like Basecamp, or our clients might want to hold our weekly status calls via video chat. Whatever your preferred method, we’ve probably tried it, and we’re on board.