Request for Interest - Website and Database Rebuild

Background:

The Hawai'i Conservation Alliance (Alliance/HCA) is a collaborative partnership based in Honolulu, Hawai'i representing conservation leaders from government, cultural, education, and non-profit organizations across the state. We track progress in conservation efforts, share new tools and technologies, identify critical conservation needs and emergent threats, and develop priority projects to address needs of the conservation community. These projects are implemented through collaborative work of the Alliance members themselves as well as through support from the Hawai'i Conservation Alliance Foundation (Foundation/HCAF). The HCAF is a 501(c)(3) non-profit with the purpose and mission to support and advance the capacity building, native ecosystem and biocultural conservation work of the Alliance/HCA through fundraising, advocacy, and strategic outreach and communications.

Through the Alliance's/HCA's goal of ensuring vital capacity and leadership in the Hawaiian Islands to effectively conserve and restore its native biodiversity, we provide resources and programming for the professional development of the next generation of conservation leaders in Hawai'i. These resources include our Conservation Connections and Conservation Career Compass websites that provide an interactive database of time-limited opportunities including jobs, volunteer work, internships, scholarships and more. These two websites are hosted on separate platforms, but both utilize the database that is behind the Conservation Connections website. However, the Conservation Connections database/website was built in 2013, is outdated, and suffers from frequent errors.

Conservation Connections (http://www.conservationconnections.org/) was built in 2013 as a resource for the general public to become more aware about and involved with environmental stewardship efforts throughout Hawai'i. The website features a directory of environmental organizations who have created a profile within the Conservation Connections database as well as a suite of opportunities posted and provided by those organizations (volunteering, events, internships, full time jobs, and part-time jobs). It allows users to subscribe to organizations. Conservation Connections continues to be a one stop shop for all opportunities related to conservation across the Hawaiian Islands and is currently the access point for the digital database of live opportunities.

Conservation Career Compass (http://www.conservationcompass.org/) is the sister site to Conservation Connections and was launched in 2017, inspired by the Mālama Honua Worldwide Voyage. As Hawai'i's conservation career building resource for students and emerging professionals, it showcases key steps for a successful career in conservation. The site uses RSS feeds from Conservation Connections to show listings of current volunteer openings, jobs, and events. These opportunities are also displayed as stepping stones for building experience. The site includes important curated perennial information including career guidance articles and stories from conservation professionals.

The Hawai'i Conservation Alliance Foundation (HCAF) seeks bids for the design, implementation, and ongoing support of an adaptive web-based volunteer management system (VMS) and the probable migration of the 2 above websites to the same content management platform. Given that we already

utilize WordPress as the primary Content Management System (CMS) for our HCAF organization website, an overview of our needs resulted in a belief that combinations of existing plug-ins currently available for WordPress are capable of meeting the majority (possibly all) of our understood needs. Most of the content on the 2 existing websites are dynamically generated by the existing system. However, we are conservationists, organizers, volunteer leaders - not web developers. To that end, we seek proposals to meet our needs as outlined below.

To facilitate the definition of our needs, we have defined several terms which will be beneficial in understanding our culture as an organization.

Term	Definition
Alliance	Hawaiʻi Conservation Alliance, the organization serving as the clearinghouse for the noted services, opportunities, and programs. Their website is https://www.hawaiiconservation.org/
HCAF	Hawaiʻi Conservation Alliance Foundation, 501(c)(3) non-profit with the purpose and mission to support and advance the capacity building, native ecosystem and biocultural conservation work of the Alliance through fundraising, advocacy, and strategic outreach and communications.
CC	Conservation Connections, a website and service which connects volunteers, interns, potential employees, employers, researchers and other users with sites or programs that need personnel. Their website is http://www.conservationconnections.org/
CCC	Conservation Career Compass, a website and service which provides career guidance, blogs, and lists of open positions (both volunteer and compensated) in the conservation field. Their website is http://www.conservationcompass.org/
Opportunity	An event, job (paid or not, internship, fellowship, co-op, etc.), general volunteer need, or some other specific task(s) that a Site or Program seeks users for.
Site or Program	Organizations or groups of people seeking users (paid or volunteer) for a specific opportunity. Each has a Site Page or Program Page on the CC site which describes the organization, entity or group.
Users	Individuals seeking an opportunity with a site or a program who have registered with CC / CCC
Provider	The entity, group, or individual selected by HCAF to create, import and support a new Volunteer Management System.
Site Manager	A user who creates a site or program and posts opportunities.
Admin	Alliance/HCAF staff who have administrative access to the design and content

	management of the new Volunteer Management System and HCAF websites.
Casual User	An unauthenticated (and untracked) visitor to any site.

Current System

At least one of the current systems exists in a Craft CMS MySQL database (LAMP-driven) and the data can be exported by our current provider for import into another system. It is expected that this exported data can be imported into the new system we desire; we would expect that an updated data dictionary is produced by the provider based on discussions of our needs. We do not anticipate needing much information beyond fundamental demographic data for our users, nor anything unusual in terms of data gathering for our opportunities, sites or programs.

Transition Needs

We would expect as a part of a successful bid:
- A general approach to the creation and implementation of a new VMS; this includes the migration of existing User, Site / Program and Opportunity data from the current system
- A proposed timeline which would include:
  - Demonstration to us (ideally, we would work together regularly so this becomes a formality)
  - A proposed schedule for transition
  - Project timeline should not exceed 6 months
    - Bidder should identify important milestones and critical decision points
- Documentation with instructions on (at minimum)
  - User management - creation, editing, deletion at an Administrative level
  - Site or Program creation - creation, editing, deletion at an Administrative level
  - User creation and editing as a user
  - Site or Program creation as a user
  - If we are expected to maintain the system in terms of version control of code, such as routine plugin updates or backup, then clear documentation of how to do so.
  - Critical files that control content, layout, and design
- An approach to ongoing support as our needs change or technology continues to evolve. We expect the lifespan of this system to surpass the 5-6 year mark, although we recognize that technology changes in an unpredictable fashion.
- Bids should not exceed **$XX,XXX**. Cost effectiveness, demonstrated ability to perform the work, including documentation and training, and experience in the field will be considered in selecting the successful bid.

New System Requirements

We have broken the high-level requirements down as below. There are several areas where we seek guidance before we can definitively move forward, but we believe that this should provide a general

idea and enough information for a prospective bidder to estimate an appropriate level of effort. While we do not maintain any type of sensitive information, we require that unencrypted connections (http) be forwarded to encrypted ones (https) automatically. We assume basic functionality of any given system to be able to generate appropriate web pages, send (but not receive) electronic mail or SMS messages via the email channel. There are no expected API or RSS feeds from the system, but the current CCC does use RSS to display existing opportunities - this is because the sites are not co-hosted. In a single hosted environment, it is expected that the CCC could display data from the CC database of opportunities directly, without the use of external calls. There are no expected long-term needs for external calls into the VMS. This VMS is expected to be Section 508 accessible to an appropriate degree - we believe most plugins are already 508-compliant. Ultimately, we want to host CC and CCC on the same platform but have them maintain their individual UI.

From an initial screen (to be created by the provider jointly with us), a casual user must be given the ability to:

- Create / Update a user account / profile
- Create / Update a site / program profile (after authentication)
- Search for opportunities and sites (also available from the header, see below)
- Note that a site or program cannot be created without an associated initial user.

Page header
There is an existing page header for the CC and CCC sites which we would like to extend to provide consistent UX regardless of the platform the casual user is on. This header should be updated to:
- Include a "donate now" button which is a hyperlink to HCAF's primary donation page
- An omni-search field allows the visitor to search for sites / programs, opportunities, dates, or opportunity types.
- The page header should allow the user to change sites between CC / CCC / Alliance and a rollover ("tooltips") should indicate each site's function. See existing CC or CCC site for an example of the transition, but not the rollover functionality.

User interface
Any new user registration must capture basic demographic data and perform expected data validity checks:
- CAPTCHA or similar
- Duplicate checking
- Zoning Interchange Postal (ZIP) code required
- User must have either a unique email address or unique cellular telephone number (one or both of these are probable primary keys) - this provides the primary method by which we contact the user.
- Automatically generate an email/SMS for the user to verify their contact point.
This interface will also have the following capabilities:
- Updating the user's profile data must utilize the same general interface (UI, "look and feel") with appropriate Save / Cancel functionality.

- A button to allow an authenticated user to create a new site / program which they would become a "Site manager" for
- If they are listed as a site / program manager, a button to allow them to manage that site / program (see below)
- During user login, we expect the typical authentication (via password) approach, along with the ability to address "forgotten password" type situations
- An individual user must be able to "follow" a site/program such that when that site/program creates new opportunities, any user following them is automatically notified via their primary communications medium.

Site / Program interface

Any new site or program can be created by an existing user; it may be that a new user is easily able to create a new site or program after they have been created and authenticated. The interface to create and update a site should be similar, if not identical, and should perform expected validity checks as above. Specific data elements for a Site or Program are mostly demographic in nature, please see Appendix 1 for additional information.

The Site / Program interface is also used to generate new and update existing opportunities, which are displayed once the Site / Program is approved. Specific data elements for opportunities can also be found in Appendix 1.

If a Site / Program is not approved by HCA (via an administrative screen) - then it is deletable / deleted. When a site is deleted, all associated opportunities are also deleted automatically.

Administrative interface

Ideally, this should have an interface similar to the standard WordPress administrative interface. This access is via an unpublished URL, and the admin user must have appropriate rights and authentication. The administrative interface provides the following functionalities:

- Approval (or denial) of pending Site / Programs
- Update of any data - user, site/program or opportunity, including the ability to make a given user a site / program manager
- Export of user, site/program or opportunity data in a CSV type format
- The ability to produce a site / program list with associated site manager contact points from their user profile
- Individual password resets as required

This list is subject to update as we move through the VMS creation process. The existing CC website can serve as a model for how we currently (and, potentially, in the future) display site / program and opportunity data. However, we are open to other alternatives based on easy and quick availability via existing templates and layouts.

"Nice to Have" Functionality

Below are numerous functions that we would like to have but are unable to determine if they are integrated into any given plug-in for WordPress in a fashion we can use them. We list them here so that if the functionality is easily available, it can be included in your proposal.

- Calendar of all (or filtered) opportunities either regardless of or by site or program (this would be for all casual users)
- The ability to create .ics entries for opportunities for users to automatically add to their personal calendars
- The ability to broadcast messages to all users (administrative system)
- Automatic updating of Alliance social media when new opportunities (for approved sites/programs) are created
- A site update checking system to verify page display (or when a site goes offline)
- An interactive Google Map of sites/programs and/or opportunities accessible by any casual user (authentication is not required.)

Other Required Site Content / Pages (To be populated with the provider's design team)
- Career Guidance Blog
- A site directory and opportunity directory (this is a predefined search of all existing sites / programs or opportunities existing from today into the future. It would exist on either (possibly both) an opportunity search page or the home page.
- "Navigator" videos and text
- About us (program with explanation and link back to Alliance etc.)
- FAQ (Instructions for using Connections)

Nice to have Site Content
- Plan and Visualize Your Career Pathway (including example visuals of actual pathways professionals)

Bid Expectations

The winning bidder will have a proposal with a high-level approach documented - can we use WordPress with existing plug-ins as we hope? Is the proposal to build a system in a new way? Perhaps some hybrid?

It will include an estimated time and/or cost, with a rider for post-implementation support (CSS or PHP updates, perhaps) and if the provider also hosts the platform, expected recurring costs for doing so. The project period should not exceed 6 months from the kickoff. The bid should include documentation and potential in-person (or remote) training in a one-on-one or one-on-many scenario.

While we do not expect a comprehensive bid covering all avenues of design and implementation, your bid should give us confidence that you have a plan to address our needs as stated and can execute in a timely manner.

Hawai'i Conservation Alliance
FOUNDATION

To view Appendix 1 please visit: https://www.hawaiiconservation.org/wp-content/uploads/RFI-Appendix-1_Website-Database-Rebuild.pdf

Thank you, and we look forward to your bid!

Proposals should be sent to Tara Meggett (capacity@hawaiiconservation.org). Proposals will be accepted until the position is filled. You may also contact Tara with questions about the project.