APBCo REQUEST FOR PROPOSAL FOR WEBSITE FUNCTIONALITY AUDIT AND IMPROVEMENTS, AND ONGOING MAINTENANCE AND OPERATING SUPPORT

The Association of Pro Bono Counsel (APBCo) seeks to engage a professional technology firm to improve known issues related to APBCo's website (www.apbco.org), as well as to perform a functionality audit and recommend further improvements. We also need ongoing maintenance and operational support, as well as suggestions for how our website can better support our mission and goals. We are not looking to redesign the look and feel of the website at this point. This RFP focuses on improving and maintaining functionality and usefulness.

Organization Overview

APBCo is a mission-driven membership organization that seeks to increase access to justice through law firm *pro bono* services. *Pro bono* refers to the provision of free legal services to low- to moderate-income individuals, community groups and other organizations that meet certain qualifications.

APBCo's 225 members run law firm *pro bono* programs in 116 firms with offices all over the world. APBCo's members are located primarily in the U.S., but also in the U.K., Europe and Australia, and Africa.

As an organization, APBCo provides professional development guidance to our members, as well as takes policy positions on issues that relate to law firm *pro bono*, and works in substantive areas that affect low-income individuals and community groups.

APBCo was founded in 2006 by five law firm *pro bono* professionals. Since that time, the organization has grown exponentially, adding more than one-third of its current members in the past three years.

APBCo's revenue primarily comes from membership dues. *APBCo does not have any full-time staff.* Rather, the day-to-day operations of the organization are handled primarily by a volunteer Board of Directors with little to no technical background. Over the years we have had some administrative support donated by law firms, and currently have an arrangement with another industry association to pay for the part-time administrative services of an employee of the other organization.

Website Users and Functionality

Our website was built in 2013 using WordPress and is hosted by GoDaddy. The site is used by groups with different needs: applicants and members, and the general public.

APBCo Applicants and Members

The [Membership Page](), which is visible to the public, contains our criteria for membership and a button to click to fill out an [online application form](). When the user submits the form, a designated reviewer receives an automatic notification that a new application has been submitted. The reviewer looks at the application on the back end of the website and if the user meets our membership criteria, the reviewer changes the applicant's status from Pending to Approved.[*] The user receives an automatic notification of the approval, along with a user name and password and instructions for paying dues.

The information the user provides on his/her application then becomes the basis for that person's member profile, which can be further enhanced or updated (such as with a photo or limited additional information). The profiles are included in a roster searchable by fields such as member name, home office location, firm name, etc. Our members use the roster to contact other members in different locations or to find out who is the APBCo member at a particular firm. The roster is accessible to members only, not to the general public.

The website also provides professional support to our members, such as a members-only library with resources that enable our members to better do their jobs, and links to helpful websites and documents. The library also contains APBCo's governing documents, such as our by-laws.

An Events page informs members of upcoming programs.

Members also pay their annual dues through a payment button on the website. We currently use Authorize.net to process credit card payments but are evaluating other vendors.

General Public

The [landing page]() of the website aims to inform visitors about who we are and what we do. Some examples of non-member users who may be looking at the website include law firms considering hiring a pro bono professional, legal services agencies considering partnering with us on an

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[*] If the user does not meet our criteria, the reviewer chooses from a list of automated messages to send, depending on the applicant's circumstances.

initiative, the media, and individuals looking for legal representation (these latter visitors are directed to other resources).

The landing page of the website also contains an [interactive map](#) of the U.S. that locates over 1700 civil legal aid organizations and public defender offices along with over 800 APBCo members' firm's offices. This map enables both legal service providers and law firm pro bono professionals to quickly access information about the law firm/public interest landscape in a given geographical region, leveraging our member data to help further our mission of maximizing access to justice through the delivery of pro bono legal services.

In addition to the membership criteria and application form described above, the public-facing part of our website includes a [list of the organization's leadership](#), [guidance](#) regarding pro bono programs and issues, [media articles](#) by our members, [updates](#) on the organization's initiatives, as well as general [contact information](#).

The public also has access to information about a series of projects our organization has done called the IMPACT projects. Some of this information is text-only and some of it is in the form of links to related documents.

The website also contains [information about our communications platform](#), Chatter (from Salesforce), as well as information about our [upcoming events](#).

Other Digital Accounts

Survey Monkey
Google
Salesforce Chatter platform
Twitter
Facebook
LinkedIn
Authorize.net
EventBrite
Quickbooks

Current Website Pain Points

General

We handle basic functions such as text updates to content on pages or adding resources to the library, but we do not have the technical knowledge or ability to make any substantive changes like building features, adding pages or menu items, improving functionality or implementing design changes. When something "breaks," or we want to tweak the functionality (for example, adding multiple recipients to automatic notifications), we need a reliable and responsive company to timely communicate with us and handle these issues, as well as to make routine updates when requested. The company would also monitor communications from WordPress and GoDaddy and advise us as to whether and how to respond. Currently we do not have the expertise to decipher whether e-mails from those vendors require action on our part or are just promotional. We need a reliable resource to help us understand and react to these types of notices.

Membership

We need to be able to use our website to effectively manage our membership data. The current functionality does not allow us to do this. Starting with the new member application, and continuing with automatic notifications, payment of dues, event updates and registration, and the content and design of our resources library, the functionality is very limited and we do not have the technical knowledge to improve it. Both at an organizational level and at an individual member level, we need to be able to sort and use our data in a more effective way. Please see Appendix A for a list of specific examples of functionality that will need to be improved as part of this project.

Scope of Work

Functionality Audit and Improvements

Phase I would include talking with current stakeholders and doing a full site review to audit functionality and make improvements, including but not limited to the issues identified in Appendix A. Phase I could begin with a content migration to a new hosting platform if that is recommended.

We will need documentation of all processes as well as training on the updated functionality for up to 20 members. The bid should include a proposed time frame for Phase I.

Ongoing maintenance and operational support

Phase II is ongoing maintenance and support. Please provide us with a proposed Service Level Agreement (SLA) for responding to requests for support, website updates, or repairs, as well as providing regular maintenance and audits of site functionality. An example of support that we would need is to change the e-mail addresses of those who receive automatic notifications when people's roles within the organization change. Another example would be creating and updating event information on both the Events page and the home page.

The ongoing support should include additional training as needed, either on a group or individual basis. The proposal should specify the amount and frequency of training included in the fee vs. paid for a la carte.

Consultation on effective use of website

Phase III involves longer-term consulting. Our website does not engage with our association members in a meaningful way. It essentially functions at present as a glossy brochure. It needs to be more interactive, more fluid and more functional. Our members do not use the website regularly, even though it could be a valuable resource to them in their everyday jobs and their careers.

We need advice as to how to make the website useful both for our members and for us as an organization. We also seek advice on how to integrate our online systems across multiple platforms (Google, Salesforce, etc.).

Bid and Approval Process

A small working group from APBCo will review the proposals, follow up with any interviews or requests for additional information and will make a recommendation to APBCo's Board of Directors.

The APBCo Board of Directors will be responsible for approving this contract.

Time Frame and Pricing

Preference will be given to bidders who can begin this project immediately.

Please also include two to four representative examples of your clients.

We would prefer a flat fee proposal for Phase I and a recurring fee proposal for Phase II (monthly, yearly, etc.).

We are flexible regarding the fee structure for any consulting work regarding how to improve the usefulness of the website after the improvements are made.

Bids are due by July 20, 2018, and should be submitted via e-mail to apbco@apbco.org.

APPENDIX A

NEEDED FUNCTIONALITY IMPROVEMENTS

New member application form

The application form needs to be revised so that each category, where applicable, has a drop-down menu so that membership data is consistently formatted and can be accurately sorted. For example, the application asks the user to enter cities in which his/her firm has offices. The user/applicant often copies and pastes the cities from another website, or abbreviates, or uses punctuation, etc., so that on the back end of the site we may have several different versions of a city name like Washington D.C. ("D.C.," "DC," Washington DC," Washington, DC", etc.). This is problematic because it results in inaccurate or incomplete search results. We need to edit the form to produce standardized results.

Payment of dues

We use Authorize.net as our merchant service provider. The way dues payment is currently configured, whether a member is new and paying dues for the first time, or renewing dues, the user clicks a button that says, "pay dues." The user is then redirected away from the ABPCo website and onto Authorize.net to make the payment. We need separate options for "new member dues" vs. "renew dues," which would then trigger appropriate automatic notifications to each of these groups (new payers vs. renewal payers).

Currently, if a member who is renewing dues enters a different email address on the payment form than the e-mail address listed in the member's profile, the renewing user will get the "welcome to APBCo" email notification that is intended for new members (even if the rest of the member's information is the same). This is confusing to renewing members and we need a solution.

It would also be better if payment all happened within the apbco.org domain and the user was not taken to a new external page (Authorize.net) to remit payment.

We also need to automate annual updates so that on January 1, the dues payment page, authorize.net page, receipt emails, etc., all reflect the current year. Or if this cannot be automated, it should be included as part of the SLA.

Dues payment, if done entirely through the website, should be automatically tracked. The current system of having to compare notes between the Authorize.net reports and our membership roll is

not efficient or practical. This should all be automated, down to the reminder emails for those who haven't paid.

Events

We are limited in the functionality of our event/calendar widget.

Visually we don't know how (or perhaps are not able, with our template – it's unclear) to display an actual calendar and only know how to display a text option.

The back end of events is not intuitive, and there aren't separate event pages, just a laundry list of all future events when a user clicks into "events" from the drop down menu or home page.

We need to be able to have members register for, RSVP for, and when applicable, pay for, events through our website. We currently track event logistics in various different locations, and the data gets lost/is stored in multiple places, so we lose out on archival data (i.e. past agendas, past RSVP lists, past budgets, etc.). We need that data/information managed in one place.

Communication

We currently use our APBCo google account (Gmail) primarily to communicate with members, as well as our Salesforce chatter platform. We also have certain limited information on our website. So, we are disseminating information across three distinct platforms, and none of them is talking to one another. We need to integrate the website with our other communication platforms as well as with our social media outlets.

Library

Our library could potentially be an incredible asset for our membership. There is valuable material currently in the library, but it is not intuitive where to find any of it; therefore many of our members are not taking advantage of the resources. In particular, the way it is currently built/displayed, users essentially have to know what they are looking for in the first place in order to find it.

Thus, visually, the library needs to be restructured so that it is user-friendly, searchable and intuitive.

Also, currently only one or two members know how to upload documents to the library. The SLA should include turnaround time and process for a user support person to upload a document

and ensure it is tagged and categorized correctly and easily searchable/accessible to our members.

Document/content management

We currently store documents in myriad places – on our website (with no consistency), on Chatter, on Google Drive, and on members' computers. We need to come up with a better, more reliable, and more streamlined way of managing our documents. We need help developing a protocol so that we can stick to it and store and access our growing library of work product, initiatives, agendas, minutes, etc. in one safe place.

Miscellaneous

Users should be able to reset a password themselves (like with most other websites) and should not have to request help from a website administrator, which is the case now.

The website needs to be capable of multimedia hosting including video, podcasts and infographics. We do not know if it has this capability currently.