



SYSTOPIA ORGANISATIONSBERATUNG • Franzstraße 11 • 53111 Bonn

Non-Commercial Stakeholder Group

Mr. Tapani Tarvainen  
via E-Mail

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Bonn, June 3rd

PROPOSAL: CiviCRM implementation

Dear Mr. Tarvainen,

please find attached the proposal as discussed.

This proposal is valid until June 30<sup>th</sup> 2016.

Kind Regards

Martin Peth  
(Partner, SYSTOPIA Organisationsberatung)

# PROPOSAL: CIVICRM IMPLEMENTATION AT NCSG

## BACKGROUND

The Non-Commercial Stakeholder Group at ICANN (NCSG) aims at introducing a high-performance, adaptable, web-based CRM software to manage contact and member data and optimize business processes. Interested parties and members should be able to apply online, as well as update their own data. Communication with members, e.g. before and during election processes is supposed to become more efficient through a centralized system with mass-mailing capabilities. Coordination within the executive committee should also be facilitated, especially concerning the approval process for new members. Opportunities for integration with NCSG or its constituencies' websites via REST API or JSON feeds should be available.

CiviCRM, combined with the CMS Drupal, seems to be a good solution for NCSG's requirements. It supplies most of the needed functionality out of the box, with many configuration options and a large toolset of modules and extensions to build on top of the basic implementation. Our proposal and the cost estimate is based on information provided by Tapani Tarvainen and discussed in a conference call on 27th May 2016.

## CIVICRM – SAFE, ADAPTABLE, FREE

We recommend the free Nonprofit-Software CiviCRM. More than 10.000 organisations already use CiviCRM to successfully manage their contacts, donations, memberships, campaigns and to send out mailings.

CiviCRM was developed particularly for nonprofit organisations and has a strong focus on their CRM needs. It is published under a free open source license which implies that there will be no licensing fees, independent of the number of users or records managed. Costs only incur for the initial set up of the software, maintaining the server it runs on and consulting services for implementing the software in the own organisation. As there are no license costs, the initial investment for consulting and technical services amortises soon which is why, compared to commercial software, free open source software usually provides significant savings in the medium and long term.

With CiviCRM, organisations stay independent regarding their design decisions and are prepared for new use cases and challenges. They are in control of their software and their data, and they are free to choose a service provider as needed. Thanks to the open source license, anyone is allowed to adapt CiviCRM, moreover it is designed to be as adaptable as possible to match the needs of different organisation types. It has, for example, a plugin system that allows extending it's functionality without jeopardising the maintainability of core functions and it has a well developed interface to integrate CiviCRM with websites and third party apps. In short CiviCRM is considerably decreasing your organisation's investment risk and provides the highest level of data protection.

## PROJECT MANAGEMENT APPROACH AND PROJECT DURATION

The outline of the project below illustrates the course of action as well as important milestones whereas the chapter "Work Packages" aims at providing an overview of the areas of work and expected measures that we could derive from the preliminary analysis. Those are also the base for the cost estimate and the end of this document.

We recommend using an agile project management approach. Agile project management is an iterative, incremental method that quickly delivers concrete results and allows for feedback and changes in requirements that very commonly occur in software projects. Using agile project management, it is possible to start quickly without having to do a lengthy phase of defining detailed requirements for the entire project.

Usually, requirements will be discussed and prioritised in a kick-off workshop or extended conference call. Results will be documented in the form of "user stories" or similar. Afterwards the project will be broken down in sprints of usually two to four weeks. A sprint aims at meeting a certain goal in the most efficient way for all stakeholders within a pre-defined time frame and fixed allocation of work hours. For that purpose, detailed requirements will be defined in the beginning of a sprint and then implemented in a very focussed way.

The output of a sprint should always be a product that can be tested and assessed by relevant stakeholders who will give feedback to the project manager and/or developers. The next sprint will, again, begin with working out detailed requirements and will integrate findings and feedback from the previous sprints.

The short cycles of defining requirements, implementation, testing and giving feedback make sure that the product does really meet the stakeholders needs and changes can be considered and incorporated in the product quickly and efficiently. In short, agile project management does not only tolerate, but expects changes during a project and focusses on delivering the most important features first, thus making it possible for all stakeholders to manage cost, time and scope of the project.

Since this basic implementation is not very extensive, it could well fit into two sprint phases. Requirements might be added if needed, extending the overall duration. We expect the basic implementation as described in this document to take 6 - 8 weeks, assuming reliable and efficient cooperation on the client side. All estimates are preliminary, the final implementation details may differ depending on the requirements.

## WORK PACKAGES

### 1. BASIC SET-UP AND CONFIGURATION

We recommend a managed server from German provider RobHost GmbH. We offer to book a CiviCRM/Drupal-optimized server in order of the customer. Then we will install and maintain the systems as required by the customer. The server can also be used to host other systems, e.g. the customer's website(s), after prior consultation.

We provide one developing/testing environment and one production environment, each with a basic configuration. The testing environment is needed to try out changes before applying them to the production site, to test new functionalities and for training purposes.

We offer to apply standard updates (minor updates) on RobHost servers at a fixed price of 25 Euros (net). Details about available plans and processes can be found at: <https://www.systopia.de/civicrm-support> (German only).

All servers as well as the registered office of RobHost are located in Germany.

#### Services include:

- Installation Drupal and CiviCRM (developing/testing and production environment)
- Basic email set-up
- Basic configuration of permission (one operative and one admin role)
- Cron job
- Enabling and basic configuration of required modules

### 2. DATA MIGRATION SUPPORT (OPTIONAL)

NCSG and its constituencies have about 500 contact member records. Using the advanced membership management offered by CiviCRM might be dispensable. This would mean that information belonging to memberships could be stored with the contacts, making the setup and data migration a considerably easier.

If advanced membership management is not needed, we offer to import contact data in a standardized process. This would require NCSG staff to fit their legacy data into a proformatted table we supply (as a spreadsheet).

Individually developed migration routines are also available from SYSTOPIA, but are probably out of scope regarding the relatively small amount of data that needs to be migrated.

Services include (optionally):

- Automated import of contact data, based on standard process

### 3. MEMBERSHIP SET-UP AND PROCESSES

NCSG as well as its constituencies have members (individuals and organisations with contact persons). Interested parties should be able to apply via forms that are integrated with CiviCRM to feed the data directly into the system. The system should also support the approval process for membership applicants. A solution could be a Drupal-based content type that requires revision by the Executive Committee's members. A different approach - probably easier to implement, but not as user-friendly - would be to use only the CiviCRM backend.

Services include:

- Analyzing requirements and developing an implementation concept
- Backend configuration
- Creating forms for membership application and update
- Creating a user flow for the approval process

### 4. ONLINE INTEGRATION

NCSG and its constituencies would like to display member data remotely on their websites. For this purpose the system must provide some sort of data feed or API to obtain the relevant data. CiviCRM offers an extensive REST API that can be used, but a more convenient way might be in this case to offer a JSON endpoint with Drupal views (a very flexible module to display data).

Services include:

- providing JSON endpoints for member lists

### 5. TRAINING

User and administrator training is key to a successful implementation. Usually it makes sense to offer basic user training to anyone who will use the system and cover advanced topics with power users. Regarding sustainability, it is recommendable that more than one person become familiar with advanced administration.

Since NCSG members are spread geographically, a face-to-face training will probably not be possible. Alternatively, we offer to organize a series of 1 to 2 hour online classes, covering from basic to advanced topic and tailored to NCSG's needs.

Services include:

- Preparation and realization of online/screen-sharing training sessions

## COSTS

According to the agile approach, the following effort estimates provide an orientation for a realistic budget, based on our experience from similar projects. Costs are based on a daily rate of 900,00 € (net). Services are only invoiced as utilized.

ITEM	NET COSTS
Basic Set-up and Configuration (on RobHost server environment)	100,00 €
Data migration support (optional; includes limited customization of our standardized contact migration process)	900,00 €
Membership process (concept, backend configuration, forms for membership application and update, user flow for approval process)	3.600,00 €
Online integration support	900,00 €
Contingent for user training and support	2.700,00 €
TOTAL	8.200,00 €

## REIMBURSEMENT OF COSTS

Travel and accommodation costs incurred by the contractor will be reimbursed by the client insofar as the travel is necessary for the delivery of agreed services, does not exceed reasonable expenditure and the itinerary has been generally agreed beforehand.