[Organization name (redacted for privacy)] Project Proposal

[Organization name (redacted for privacy)] Connect Product Proposal

After receiving the necessary information from the nonprofit organization, Bits of Good should compose a brief overview of the issues the client faces and how we can help.

Contact Information/Communication

Nonprofit Point of Contact #1:

Contact information for representative(s) of the customer

Name: [redacted for privacy] **(Founder and Executive Director)**

Email: [redacted for privacy]

Phone Number: [redacted for privacy]

Communication/Availability:

I reached out through cold email using the website email box, received a response about an hour later. For the first meeting, she came well-prepared even without being asked, with a written document detailing the features she wanted. A couple check ins afterwards for clarity regarding some features.

Scope/Timeline: No particular timeline

Other:

Nonprofit Point of Contact #2:

[redacted for privacy]

Bits of Good Point(s) of Contact:

Contact information for representative(s) of Bits of Good

Name: Rhoney Lee

Email: rhoney.p.lee@gmail.com

Phone Number: 678-216-6388

About the Nonprofit

Organization Description:

Nonprofit organization's mission statement and methods of accomplishing their goals

Name of Nonprofit: [redacted for privacy]

Website: [redacted for privacy]

Mission:

To Build a Base of Power for Black Lesbians 40+ through Advocacy, Support, and Community-Engaged Research.

"In 2011, [Founder]*, a Metro Atlanta community activist, social worker, and public health community researcher, noticed that in increasing numbers, many Black lesbians older than 50 were beginning to disappear from community-based activities and organizations. She wondered if health issues, the youth-oriented LGBTQ culture, or racialized ageism might be to blame. To increase opportunities for advocacy, organizing, and social support and to explore the healthcare needs and coping strategies of Black lesbians,* [Founder] *founded* [Organization name].

[Organization name] *operates within a feminist social justice framework, promoting health and wellness. We affirm, empower, and support each other in creating new paradigms for conscious aging. Our work is community work, **it is collective work, it is communal work, it is feminist work, and it is social justice work that fights actively against racialized ageism, racism, sexism, classism, ableism, homophobia, transphobia, and xenophobia**. It is sustained work and a responsibility to forge a better world for future generations."*

Problem Overview:

Briefly describes the issue that the nonprofit is experiencing and needs assistance with

The current biggest issue the nonprofit faces is that they lack a streamlined management system for their 3 types of supporters:

1. Members (annual priced membership)
2. Volunteers
3. Donors

Currently, there is no single system that keeps track of all involved people. Each group above is kept track of in a different way, which makes it hard for staff to manage, and thus, lots of work has to be done manually.

Current Process:

The current process that the nonprofit organization uses and how it may be contributing to the problem.

- **NEW MEMBERS**

  New members sign up using a form on their website ([website link, redacted for privacy]). However, member fees are not connected directly to this, and use the PayPal donation method.

  Main problem here is that it's unnecessarily multi-step. Ex. someone might sign up on the form but forget to pay the PayPal fee, so they aren't really signed up? Right now staff are manually contacting them to finish sign up.

- **VOLUNTEERS**

  Volunteers sign up using a google form, where they fill out personal information + volunteer skills/preferences.

  [form link, redacted for privacy]

  Using a google form means it has to be constantly checked and updated + staff has to filter through individual responses for member matching to volunteer events.

- **DONORS**

  Donors have no sign up form; instead, they go through a PayPal donation link (below) or mail a check to the P.O. box.
  [link, redacted for privacy]

Recurring donations, one time gifts, and donations during campaigns are all currently done through the paypal, and recorded manually by staff using a spreadsheet, which is inefficient time-wise and leads to trouble tracking trends.

Vision/Goal:

Please describe what the project is about overall and the final goal you have in mind. Please provide quantitative results, ex. "Increase volunteer engagement by 50%"

Overall goal is to **streamline** management for the above 3 groups of people so that staff have to do less work manually. This can be done using several methods, as outlined in the proposal. As for the nonprofit, they hope increase the number of members by 50%.

More Details:

Any extra details about the project that the team should know. Ex. There's a team already working on it.

Are they a 501(c)(3)? Yes

Any reviews or comments on Google, Facebook, or other social medias? (do a Google search on them)

- 4.7 stars on Facebook
- 5.0 stars on Great Nonprofits, with all positive reviews
- 5.0 stars for their podcast segment on Apple Podcasts

Will we be dealing with any user data? Is this data sensitive?

Yes, user data about members' self-identifying information and donation amounts + frequencies. This info should be made viewable to the individual member and staff only.

(if building off of an existing application) Does the nonprofit have ownership over their own code? If not, who owns their codebase?

[redacted for privacy]

How large is the nonprofit? (Number of employees, full-time or part-time, number of chapters/locations)

- Two full-time staff members and three contract staff members
- Two state chapters located in North Carolina and Georgia, as well as national members at large
- [redacted for privacy]

How Bits of Good Can Help

These should be written once the above points are answered by the nonprofit to pitch to them upon meeting:

Project Overview:

Summarizes Bits of Good's objective towards the nonprofit organization and how we can amend the current process.

Bits of Good proposes a web-based solution introducing multiple new features, integrated into their current website.

Organized in terms of estimated priority.

***Note: This is a list of all features the nonprofit wanted. They understand that not all features may not be possible.
I estimate this project can take place over several semesters, with just one or two new features being integrated per semester.

1. Create a **profile page and dashboard** for anyone who wants to become involved.

- **Problem:** Members, volunteers, and donors are all tracked separately by staff, and no one can access their own information that they gave upon initial signup.
- **Solution:** This solution introduces a profile page feature, regardless of status. Individuals can have access to a dashboard where people can view and update their own information, track volunteer hours, and see donation history.

2. **Automated email system**

- **Problem:** All communications are being conducted manually by staff, from newsletter emails to all members, to payment follow up for an individual member. This is very time intensive.
- **Solution:** Automated email system that can be activated based on specific user actions or timelines, such as welcoming a new member once they sign up, or thanking a donor after a donation.

3. **Task matching system** for volunteers

- **Problem:** Upon signup, volunteers fill out a google form listing their interests/skills, but cannot update these. There is also no central page on the website containing all volunteer opportunities.
- **Solution:** Central page with all volunteer opportunities needs to be integrated into their website first. When a new volunteer opportunity is posted, staff can select tags correlating to the interests/skills wanted for this event, and it automatically sends a email to all volunteers who have that skill/interest.

4. **Analytics and Reporting**

- **Problem:** There is limited visibility into key metrics such as membership growth, donation trends, and volunteer engagement, which makes it difficult to assess the success of campaigns, fundraising efforts, etc.
- **Solution:** Implement a analytics system to provide insights into key metrics. This should be visible for staff members so they can see what is working vs. what is not.

Proposal:

More in-depth description of how Bits of Good can approach the problem and potential issues and benefits associated with each approach

Some ideas of how to implement are included (not strict)

1. Create a **profile page and dashboard** for anyone who wants to become involved.

- Start with initial sign up, where you can select your main form of involvement: member, volunteer, or donor.

    - Separation may be necessary at the beginning because the different forms ask different questions.
    - Later, they should be able to fill out other involvement forms (ex. if they were a donor only but now want to become a member).
- Access to a dashboard where anyone signed up can view and update their own information, track volunteer hours, and see donation history.

2. **Automated email system**

- Welcome Emails: Sent automatically when a new user signs up, providing an introduction to available resources and links to their dashboard.
- Membership Renewals: Set reminders for upcoming renewals, sending notifications at pre-set intervals (ex. 30 days before expiration) to ensure timely renewals.
- Donation Acknowledgments: Automatically send personalized thank-you emails after each donation, with options to acknowledge recurring donations and special recognition for significant contributions.
- Donation requests - Seasonally, for a specific campaign, based on previous donation history, etc.
- Event and Task Reminders: Notify users of upcoming volunteer opportunities, event registrations, or scheduled tasks based on their interests and past participation.

3. **Task matching system** for volunteers

- Volunteers initially fill out a form listing their interests/skills. This information can be displayed and updated on their profile
- When a new volunteer opportunity is posted, staff can select tags correlating to the interests/skills wanted for this event, and it automatically sends a email or sends a notification to all volunteers who have that skill/interest.

4. **Analytics and Reporting**

- Membership Metrics: Track the growth of membership, retention rates, and the effectiveness of renewal campaigns.

- Donation Analytics: Generate reports on total donations, average donation amounts, and the effectiveness of fundraising campaigns.
- Volunteer Activity: Monitor the number of volunteers, hours contributed

User Group:

Who will be the main users/audience of this software?

Both participants (members, donors, volunteers) and staff members would be in use of the above software. The estimated population is women, over the age of 40.

Main Engineering Components

Main engineering components (short bulleted list)

- User account and data management
- Task matching and tagging system for volunteer opportunities
- Automated email system
- Analytics and reporting dashboard
- Payment integration

Main Design Components

Main design components (short bulleted list)

- Role-based dashboard views (Individual member versus Staff view)
    - Design should be secure and trustworthy: Privacy for identifying and financial information
- Customizable email templates
    - Designers should ask themselves:
        - What are the specific tags/categories for volunteer skills for task matching system?
        - Should we give users the option to opt out of certain emails from automated email system?

- Visual tracking tools (graphs) for metrics
    - Keep note of the important stats needed for membership metrics, donation analytics, and volunteer activity.
- Intuitive UI/UX
    - To create an intuitive design, designers should ask themselves:
        - What are all the steps to sign up as a new member, volunteer, donor? How can we design the process to be as simple as possible?
        - What are feasible ways that developers can integrate payment that we should base the design off of? Is there a specific integration process developers want to use?
        - What is the specific current process for all the work being done manually by staff? How can we translate their process into the new design without too much new training work for staff?
            - Example: The new design automatically records donations once made by a member, but how can we make the filtering process for donations (a step still necessary for staff sometimes) be intuitive for the staff without learning a whole new process for filtering?
- Mobile and desktop friendly