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PALANTE TECHNOLOGY COOPERATIVE, INC / PROPOSAL

Prepared For: Kathryn Benedicto, Happy Snowman Tech on behalf of CPEHN
Date: 12/12/13

Project: CiviCRM Implementation and Migration for CPEHN
California Pan-Ethnic Health Network (CPEHN) requires a migration of data from a legacy CRM into CiviCRM. CiviCRM must be implemented and configured in accordance with the RFP and supporting documents provided.

About Palante Technology
Palante Technology is a worker cooperative dedicated to providing web, database, and general technology consulting and support to social justice-oriented organizations. The Palante Tech team (currently five people) combines a breadth of experience and extensive skill sets to develop solutions that are informed and shaped by our clients' missions, constituencies and target audiences.

We have successfully implemented CRM systems for a number of organizations. Examples include Communities United for Police Reform, the National Police Accountability Project, Sylvia Rivera Law Project, National Lawyers Guild, US Federation of Worker Cooperatives, and Families For Freedom. We pride ourselves on our ongoing relationships with these organizations, and our ongoing support of CiviCRM systems. We feel that CiviCRM is well-positioned to handle CPEHN's needs based on earlier phone conversations with Pam, David and Kathryn, along with a thorough reading of the RFP.

CRM development costs
Each general task is accompanied by an estimate of how much the task will cost based on **an hourly rate of $105**. Palante Tech prides itself on bringing in CiviCRM projects at or under budget. While we may complete our tasks well under our estimate, we encourage you to consider the estimate as a realistic expectation of cost.

APPENDIX A: Summary of work

Data and Needs Assessment
We will work with you to determine how CiviCRM will need to be configured and customized to meet your needs. This will include a thorough assessment of how you track and use data about contacts.

CiviCRM Installation and Basic Configuration
We will install and configure the core software for CiviCRM. We will install the extensions we have identified as necessary to support your needs.

Constituent Data Configuration
We will set up the tags, groups, contact subtypes, custom data fields, relationships and communication preferences identified in your Google documents as well as during the data needs and assessment phase.

Mass Mailing
We will set up CiviMail so that it can be used to send and track mass mailings to CiviCRM contacts via the CiviSMTP service. Bulk mailing history will be tracked automatically on constituent records. Please note that this does not include creating mailing templates, headers and footers – modifying existing templates for CiviCRM takes approximately 15-30 minutes per template.

Event Registration and tracking
We will enable event registration and attendance tracking. Event Participation records will be tracked per constituent and searchable across all data fields. During training, we will cover event info page creation and managing the registration process. We will install the CiviDiscount extension to enable discount codes. We will enable collecting information about both individuals and their organizations. CPEHN staff will be able to track number of waived fees, payment status, etc.

Online Donations and Tracking
We will configure CiviCRM to allow you to easily create as many donation pages as are needed. We will configure a main donation page. This page will allow donors to make one-time or recurring donations, collect basic data, etc. We will demonstrate how to clone a donation page for use with specific campaigns and how to create additional donation pages.

Payment Processor Integration
We will integrate a payment processor into CiviCRM that supports recurring transaction subscriptions. This is a necessary requirement for online donations and event registration payments. All payments will be recorded in CiviCRM as the appropriate payment type and are searchable across all fields.

Reports
We will setup the standard reporting functionality. We will configure one example report of each type described in your Google Doc.

Data Export, Transformation, and Migration
We will export data from your existing CRM, perform automated cleaning, and pass manual cleaning back to you. After we jointly clean this data, we will convert it into a format suitable for

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import into CiviCRM and perform the import.

Training
There are multiple training options available. This proposal budgets for two two-hour trainings, one basic and intermediary for all staff and one advanced for staff responsible for administration.