

Company presentation

Company background

Cividesk was founded in 2009 on the premises that CiviCRM users will need on-going support and best practices sharing to fully realize the potential of this incredibly rich software.

Over the years Cividesk has grown to become one of the leading Software-as-a-Service providers for CiviCRM. We do have customers in more than 25 countries or states around the world¹, spanning all types of nonprofit organizations – charitable, humanitarian, advocacy, religious, political, governmental and trade-oriented.

We have offices in Denver, Colorado and France in order to best support our customers in various time zones, and a development center in India to answer our customer's needs for software customization and custom developments.

Cividesk has 8 staff members including one person dedicated to training and a technical team of 4 people to provide customer support, data migration, implementation, customization, custom development and programming.

Contribution to CiviCRM Community

- Founding member of the CiviCRM Partner's Association
- A recognized Active Contributor to the project
- An active member of the CiviCRM Marketing Committee
- A regular speaker at annual CiviCon conferences
- Organizer & host of CiviCon 2015 & 2016
- Organizer & host of CiviDay in Denver/Paris/Phoenix/San Francisco
- An active member of the Core Security team
- Creator and maintainer of CiviCRM Statistics framework
- Creator and key maintainer of the LTS release for CiviCRM² designed to provide additional security and reliability
- Maintainer of CiviCRM standalone
- Author of several extensions including Constant Contact integration, Google Apps integration, Colorado Gives integration, CiviNormalize and Help Tab

¹ <http://cividesk.com/customers>

² <https://civicrm.org/blogs/dave-greenberg/long-term-support-lts-release-its-official>

Company culture

Our company's culture is very specifically focused on customer satisfaction and this is visible in every aspects of how we do business:

- We specialize in CiviCRM implementation, hosting and support, whether as Standalone or integrated within Drupal, WordPress or Joomla. This razor sharp focus ensures we develop a very deep expertise in these technologies that directly benefits our customers.
- When building websites in Drupal, Joomla or WordPress, we provide deep integration with CiviCRM in order to seamlessly and transparently present, enter or interact with the CRM data.
- Our primary offering is Software-as-a-Service, an all-inclusive service, because we want to fully commit to our customers over the long term and be there whenever they need us. We are honored most of our customers have become friends over time, and our primary source for new business comes through customer referrals.
- We develop long term relationship with our customers. All our Software-as-a-Service or support contracts are month-to-month with no penalties or cancelation fees because this is the best way we can guarantee our customers that we will provide the same impeccable service from the very first day as over the long term.

Giving back is another cornerstone of our company culture, and we are always seeking to support charitable and/or humanitarian organizations. Please refer to our website³ for further details.

What our customers say

"The personal touch from Cividesk helped me with the learning curve." - Jeff M., Heart Of A Warrior Foundation

"I don't know what we would have done without the initial trainings and weekly mentoring sessions provided by Cividesk". - Mary G., The Women Fund of Santa Barbara

"CiviCRM is a powerful tool but the service provider you choose to work with will make all the difference in the world". - George G., South High Foundation

"We really like the Cividesk Software-as-a-Service model with predictable monthly costs for maintenance and support." - Suzanne G., Denver Ballet Guild

"We really appreciate Cividesk's availability to help with questions, their follow-up and the assurance that you will have all the information you need. They are very reliable." - Natalia F., Heart's Home USA

"I don't have to worry about the system being down since the database is hosted on servers monitored daily by Cividesk" - Gail C., Highland Hospital Foundation

"Cividesk support has been invaluable. I know I can call and ask questions and talk to someone right away who can help." - Kristina O., The Vietnamese Friendship Association

³ <http://cividesk.com/about/giving-back>

Benefits of Software-as-a-Service (SaaS)

Affordable

No large up-front costs. The monthly subscription that includes hosting, maintenance, backup, upgrades, unlimited customer support, mentoring and continued education is more cost effective than paying consulting/support service per hour. We don't limit our time, you can contact us as often as you want. Furthermore, the cost of operations are predictable, no surprise and can be budgeted in advance.

Zero Infrastructure

When delivering CiviCRM via SaaS, the complexity of the underlying IT infrastructure is all handled by us. You do not need to worry about the maintenance of hardware, or which operating system version supports which database – we will take care of all of this for you, so you don't have to and you can focus on fulfilling your mission.

Seamless Upgrades

We will manage software updates and upgrades for you, eliminating the need to install or download patches. At any time, you can be assured that you will always have the most reliable software.

Backups and Data Recovery all done for you

If you are familiar with traditional software, you will know that unless a costly automated solution has been implemented, the process of backing up your data on a daily basis can be laborious at the best of times. We eradicate this painstaking task, instigating automatic backups and thus ensuring the integrity of your data.

Continued Education

We provide you with continued education so you can take advantage of all the features and capabilities of CiviCRM. Weekly short webinars named CiviTips are available to you where we offer tips, share best practices, present new features or a refresh on a particular CiviCRM functional area. When we upgrade your application with a new major release, we also train your end-users on the new functionalities to make sure you can immediately benefit from this upgrade.

Service Description

Cividesk offers CiviCRM and WordPress in the Software-as-a-Service model, an all-inclusive offering that includes the hosting, maintenance, customer support, ongoing mentoring and continued education.

There are no commitments, and no surprises – a one-time startup fee and a fixed monthly subscription provides you with a complete solution, personalized for your organization and fully maintained over time - and we are just an email or phone call away for any questions you might have.

With this efficient and affordable solution, we help non-profit organizations of all sizes streamline their operations, communicate and collaborate more efficiently for stronger relationships with their constituents and increased results.

QuickStart

The Quickstart service regroups activities that are needed to setup the solution, configure the CiviCRM software to your unique organizational requirements, and have your end-users trained and ready to use it.

It usually takes between 4 to 6 weeks to go through this phase, and will require active participation from your staff, including providing information, reviewing configuration choices, producing import files, de-duplicating data, attending the training sessions and submitting questions and feedback.

The Quickstart service includes:

- **Initial consulting:** we will send you a questionnaire and perform interviews of key personnel in order to better understand your organization, processes and current technology. We will then build a timeline for the deployment of CiviCRM in your organization and provide recommendations and/or best practices for a successful deployment.
- **Instance setup:** we will setup your instance of the software on our hosting platform, configure and test the backup system, configure and test an email sending system based on the forecasted volume, including SPF records and return channels for processing bounces and unsubscribe requests.
Note: High volume email blasting will require the use of a separate email service in order to manage your online reputation and avoid blacklisting.
- **Software configuration:** we will configure CiviCRM according to the recommendations from the previous phase including localization settings, contact types and corresponding custom fields, membership types, system profiles, email templates (for transactional emails such as the membership renewal reminder email or donation receipts), online membership signup and renewal pages, online fundraising page, one online event registration form, online payment processor, configure the job scheduler and needed jobs and setup synchronization with MailChimp.
Note: The creation of templates to be used bulk emailing in CiviCRM is not included in the Quickstart neither a Cividesk service.

- **Integration with WordPress:** CiviCRM integrates with WordPress as a plugin. CiviCRM public forms such as online contribution pages and event registration pages will be shown to the public in your selected WordPress theme. When logged in to your Control Panel, an administrator will access CiviCRM by clicking on a link in the left sidebar menu.

CiviCRM offers a function to synchronize WordPress users to CiviCRM contacts: CiviCRM will check each user record for a contact record. A new contact record will be created for each user where one does not already exist. If an end user is logged into WordPress, you can display what information you have on record for this user within CiviCRM and also give him the ability to edit that information.

We will install the CiviCRM WordPress extension plugin, we will synchronize CiviCRM contacts with WordPress users using the plugin “CiviCRM WordPress Profile Sync”, we will configure the preferences of the User Dashboard and we will configure the WordPress user registration using a CiviCRM profile and we will install the plugin “CiviCRM WordPress Member Sync”.

Note: The CiviCRM WordPress plugins require a minimum of WordPress 3.9.

- **Data import:** we will import the data you provide us with, including format and character set conversion, data transformation, de-normalization, data scrubbing, creation of an import script and test environment. Data that can be imported include full contact, membership, event and payment information.

Note: The files provided by the customer must be conformant with Cividesk import guidelines; if they are not, the customer will either need to correct any inconsistencies or will be charged for time spent correcting these files at the regular Cividesk consulting rate.

Note: depending on the quality of your data, de-duplication might be needed to resolve duplicate contacts in your database. We cannot perform this step as we do not know your constituents, and are therefore unable to judge whether potential duplicates should be merged or are two different persons. Cividesk has tools that can help identify and merge duplicate contacts; we will train your staff on using these tools to perform de-duplication if needed.

- **End-user training:** we will remotely train your users on day-to-day usage of the software through online sessions. Each participant will need a computer with Internet access to attend these training sessions. Our training plan includes 4 two hour sessions – one on contact management, one on event management, one on membership management and one on contribution management. There is a maximum of 8 participants per training session.

Subscription

The monthly subscription service includes the hosting, maintenance and updates of your solution as well as ongoing technical support, mentoring and best practices sharing with your staff.

Much of this work happens ‘behind the scene’, and your staff will only see that their application instance is available and performing as expected, and regularly updated with new features. They will also operate in confidence knowing that there is someone available to answer their questions or provide assistance should they need it.

The monthly subscription service includes:

- **CiviCRM and WordPress Professional hosting:** we will host your application instance on our servers. Our servers build have been specifically optimized for CiviCRM and WordPress in order to bring maximum availability and performance to our customers. Our servers are constantly monitored for both availability and performance and alerts are triggered in case of incidents. With staff located in both the United States and India, we are able to answer these alerts at any time and fix these issues as they arise. We have daily snapshots, local and remote backups in place. Our servers are hosted with one of the leading providers in a top-tier US datacenter.

Note: the price quoted includes hosting on a shared, virtual server in the US and with our standard processes. Options such as hosting on a dedicated server, hosting in other regions of the world, or customized processes to accommodate your specific monitoring, backup or security requirements are available for an additional fee.
- **CiviCRM Application maintenance:** we will install new versions of the software and perform any upgrade tasks as needed – including database updates, additional system or software configuration, etc. We will install the latest CiviCRM version supported by Cividesk (see our Github repository).
- **WordPress integration maintenance:** we will maintain the integration of CiviCRM with WordPress which includes: updating WordPress theme as needed to seamlessly present CiviCRM content on your website, synchronizing CiviCRM contacts with WordPress users and installing new releases of the CiviCRM WordPress extension plugins when they become available.

Note: in line with our security practices, we will require that your WordPress instance, as well as all plugins, themes or other modules, be always updated to the latest available stable version. The maintenance of all WordPress plugins except the CiviCRM related plugins is not included.
- **CiviCRM Customer support:** we will provide technical support to your users and deploy best efforts to answer any usage questions, perform additional software configuration, and otherwise correct other issue that you will bring to our attention. Customer support does not include correction of software defects; if needed it will be billed at our standard hourly rate. User support is available by phone, email and all support requests are managed with our ticketing system.

Note: We might, at our sole discretion, gratuitously perform minor programming tasks such as fixing trivial bugs, defining new reports, changing application screens or tweaking application logic. We will provide a cost estimate for any request whose scope exceeds our customer support services and requires custom programming and/or system administration tasks.

Note: Customer support on community contributed CiviCRM extensions will be provided for an additional fee. Programming tasks such fixing bugs on community contributed CiviCRM extensions and CiviCRM WordPress plugins not developed by Cividesk will be billed at our standard hourly rate.
- **Mentoring and continued education:** we will continue to provide advice, best practices, and continued education to the current users as required. Continued education are short webinars where we offer tips, best practices, new features or a refresh on a particular CiviCRM functional area. The continued education complements, but does not replace, the initial training.

Note: New users are required to attend our main training curriculum⁴ before receiving our support services. They can either register to our public training sessions⁵, or we can plan for private training sessions at our standard consulting rate.

- **Synchronization with MailChimp:** The MailChimp synchronization service allows you to maintain your contacts and distribution lists within CiviCRM and have these automatically available within MailChimp for your mass mailing needs – thus saving you time and avoiding double entry errors. Each CiviCRM group can be synchronized with a distinct MailChimp mailing list. This includes Smart groups, which are dynamically defined such as ‘All current members’. For example, if a new member signs-up online, it will be automatically available in the CiviCRM Smart Group, and therefore created in the corresponding MailChimp mailing list.

Note: All the services are provided on all CiviCRM core modules except CiviCase and CiviAccount (Accounting integration). Services (configuration, training, customer support) on these modules will be billed separately. Services on community contributed CiviCRM extensions will be provided at our sole discretion.

Optional Services

WordPress Application maintenance: your WordPress website needs regular maintenance to perform as it should. WordPress needs to be maintained so it stays reliable, secured and compatible with CiviCRM. Keeping your WordPress installation up-to-date is extremely important, especially since so many WordPress updates are security fixes and patches that will prevent potential exploits of the vulnerabilities of your website or blog. Staying on top of the latest updates and security warnings is technical and you need to have a professional to take care of it for you. The maintenance we are providing includes the installation of the different upgrades. WordPress usually rolls out major updates twice a year, though minor updates roll out as needed. We always back-up before updating and offer full support if there are any compatibility issues. We also update your WordPress theme and plugins if there’s a new version available, and resolve any compatibility issues.

WordPress Customer support: we will provide technical support to your users and deploy best efforts to answer any usage questions about a plugin or if you want to change some content on your site, perform additional software configuration, and otherwise correct other issue that you will bring to our attention. Customer support does not include correction of software defects; if needed it will be billed at our standard hourly rate. User support is available by phone, email and all support requests are managed with our ticketing system.

Note: WordPress customer support does extend to all installed plugins. However, it does not include the design of new pages, menus, block, webforms, rules or any other WordPress website elements.

These can be performed by your staff, regular webmaster, or by Cividesk at our standard hourly rate.

Note: We might, at our sole discretion, gratuitously perform minor programming tasks such as fixing trivial bugs, defining new reports, changing application screens or tweaking application logic. We will provide a cost estimate for any request whose scope exceeds our customer support services and

⁴ <http://cividesk.com/training/training-curriculum>

⁵ <http://cividesk.com/training/training-calendar>

requires custom programming and/or system administration tasks. Programming tasks such fixing bugs on community contributed CiviCRM WordPress plugins will be billed at our standard hourly rate.

IT Bliss, LLC
d.b.a Cividesk
8101 E Dartmouth Ave #21
Denver, CO 80231, USA
+1 (866) 670-7165



Service Quote

The Media Consortium
Attention: Jo Ellen Kaiser
San Francisco, CA

Prepared on: March 30, 2016

Services	Setup	Recurring
Software as a Service: Cividesk		
Quickstart Initial consulting, CiviCRM instance setup, software configuration and end-user training (8 hours) as described in service description, WordPress instance transfer to our servers and integration with CiviCRM.	\$3,480.00	
Data import – to be estimated once we receive a sample of the files	\$120.00/hour	
Monthly subscription – 2 users Professional CiviCRM and WordPress hosting, CiviCRM application maintenance, integration with WordPress maintenance, on-going customer support (email and phone), mentoring and continued education as described in service description. Includes support and maintenance of MailChimp extension.		\$260.00/month
Options		
WordPress subscription: application maintenance and customer support		\$140.00/month
Support and maintenance of community extension Stripe payment processor		\$20.00/month
Any additional work (database reconfiguration, data conversion, custom report template, custom development, etc.)	\$120.00/hour	
Each additional user		\$40.00/month

Terms and Conditions:

All prices quoted in USD. This service quote is valid for 30 days.

Payment of setup fees by ACH, check or credit card with order. To avoid service interruptions, automatic payment of recurring fees by ACH or credit card only.

The setup fees (Quickstart) have been calculated based on what you have shared with us. If any change requests are made, we might need to revisit the Quickstart fees.

Setup fees are non-refundable once services have been delivered. Service is conditioned by continued acceptance of the Terms of Service as published by IT Bliss, LLC.