



**REQUEST FOR PROPOSAL**  
CC English Software Platform

**Project Summary**

Intercambio is searching for a software development team to design, build and maintain a custom platform and provide ongoing support to support our CC English program.

**Background Information**

Intercambio is a 501(c)3 non-profit organization whose mission is to bring English learners and community volunteers together in language classes and gatherings to build skills, confidence, and life-changing connections. We provide ESL classes both in person and online with volunteer teachers, and support similar organizations across the US with curriculum, training and networking opportunities. Intercambio's funding sources include curriculum sales, network partner fees, student fees, and support from individual donors, foundation and corporate grantors, and several government entities. More info - <https://intercambio.org>.

Our CC English program currently uses a proprietary software platform to register, onboard, match and facilitate online teaching sessions between volunteer teachers and students. This project aims to replace the participant-facing aspects of the current platform and integrate with Intercambio's existing Salesforce database for improved management capacity. We hope to greatly increase the number of participants we can serve over the next five years. More info - <https://ccenglish.org>.

**TECH SUMMARY**

Intercambio is looking to partner with a developer team to build and maintain a custom Training Management System (TMS) platform (online and/or app) or provide custom development to enhance an on-market application to support their English CC Program. At a high level, this platform must provide the following features:

- Registration and Onboarding
  - Provide specific participant tools such as surveys, quizzes, payment, teacher-student pairings and un-pairings (one to one and one to many and many to many)
  - Send alerts and reminders to participants via email and/or SMS
- LMS/TMS functionality
  - Scheduling and calendar views of class times
  - Posting and categorizing learning resources in PDF, weblink and other formats
  - Link with a video-conferencing tool
- Payment Processing
  - Support initial student registration fee and per class session fee payments
  - Payment processors will include at least: an existing Stripe account, PayPal and Venmo
- Accessible
  - Designed to be easy to use for less technologically sophisticated participants
  - Mobile/small screen-friendly, as many participants use smart phones and tablets and do not use computers
- Salesforce integration with standard and custom objects
  - May include additional configuration and/or development in the existing Salesforce platform to accommodate new data flows

- The administrative backend will primarily be in Salesforce, supplemented as necessary with Salesforce features such as journeys, campaigns, texting, email, etc.
- Administrative functionality
  - Administrators should be able to customize content, learning materials and alerts as well as create and run reports, manage participants, and track use of the platform
  - Sync with Salesforce standard and custom objects based on set actions taken by participants
  - Features that allow staff and administrators to monitor usage, enforce guidelines and terms of use, and archive and remove users and unwanted user content (i.e. messaging).

## **TECHNICAL REQUIREMENTS**

Full technical requirements are provided as Exhibit A.

## **VENDOR REQUIREMENTS**

The selected vendor/vendor team will have experience with:

- UI/UX design that is consistent with customer branding and accessible for non-technical users (experience with designing for English language learners is a plus)
- Salesforce NPSP configuration
- Salesforce integration and development
- Utilizing the Salesforce API for external integrations as well as installing and customizing existing Salesforce Marketplace applications
- Payment processing integration
- Video conferencing integration

The selected vendor/team will be available for ongoing support of the platform including data storage and software improvements and expansions.

## **Contract Details**

### **Timelines**

Proposals are due by October 7, 2022.

Intercambio expects to be ready to begin the project by November 14, 2022. Prior to the close of the calendar year, the project team will complete any additional discovery required, complete design and deliver mock-ups. We anticipate that the project will be complete and online no later than the end of June 2023. Intercambio expects to see several testing phases scheduled in the development timeline, including testing with live participants.

### **Payment**

For development of the new platform, Intercambio would pay an agreed-upon project rate, with a percentage of the total due at mutually agreed upon project milestones.

For ongoing support, proposals should include ongoing support pricing and contract terms.

## **How to Submit a Proposal**

Please submit the following to Becky Campbell-Howe, Director of Operations and Technology, [becky@intercambio.org](mailto:becky@intercambio.org) no later than October 7, 2022:

- An explanation of how you would approach the project.
- Your qualifications for this project.
- A summary of your recent and relevant projects, especially with non-profit organizations (no more than 3 projects).
- Names and qualifications of any staff you would assign to work on the project.
- An explanation of how you typically structure payment terms for your projects and an estimate of your charges for this project.
- Names, phone numbers, and email addresses of individuals at three (preferably nonprofit) organizations who have been your clients recently and whom we can contact as references.

Please compile all information into one document. This one document can include links to examples or your online portfolio. Please include links to specific, relevant projects.

If you have questions as you are preparing your proposal, please feel free to e-mail.

We expect to evaluate proposals through October 21, and to set up interviews with firms we'd like to explore working with the week of October 24.

Thank you for your interest!

## Exhibit A - Detailed Requirements

Terms with definitions in Exhibit B are bold the first time they appear here.

Requirement	Priority	Additional Context
<b>GENERAL</b>		
The Platform must work for participants on computers, tablets and phones. Whether it is a standalone app or web-based, it must be adaptable and user-friendly across devices.	High	
Intercambio uses Salesforce as its administrative database and the Platform must integrate with Salesforce.	High	
Platform must support scaling to 1000+ <b>student/teacher pairings</b> from 100-150 pairs currently	High	
Since any costs for the platform will be passed on to participants, low-cost solutions are desirable to reduce barriers to entry. Cost factors of concern include storage and video conferencing needs.	Med	Zoom is the preferred video conferencing solution. Easy to maintain is preferable to a pastiche of unrelated products.
<b>REGISTRATION</b>		
The Platform must support participant <b>registration</b> , collecting basic contact and demographic information that is passed to Salesforce to create or update a contact record. Registration must validate that participant lives in the United States.	High	
The Platform must gather payment info and support payment of an initial fee from <b>students</b> at the time of registration and an ongoing fee per <b>tutoring</b> session.	High	
Payment methods offered should include Credit Card (through Stripe). Offering PayPal or Venmo as well would be nice, but not strictly necessary. All payments will go to Intercambio.	High	Sensitive payment info should be stored securely by third party apps or website.
The Platform must also support teacher registration. Teachers will sign up (at which point data should be passed to Salesforce to create or update a contact record). Teacher registration must support validation that individual lives in the United States. Teachers are unpaid volunteers, but there should be payment capabilities for them. We will periodically be asking them for contributions.	High	

**Exhibit A - Detailed Requirements (continued)**

Requirement	Priority	Additional Context
<p>Both student and teacher contact records in Salesforce should be updated for the appropriate stage of involvement. The stages of involvement for students and teachers (current but open to improvements):<b>No profile</b> – they set up an account and verified their email address, but didn’t start the <b>onboarding</b> process.<b>Onboarding</b> – they have filled out the initial information form but have not finished either the teacher training video and quiz or the student placement test<b>Waiting</b> – they have completed all of the onboarding steps and are waiting to be <b>paired</b><b>Active</b> – they are paired and meeting<b>On hold</b> – they are still paired, but taking a break from meeting<b>Done</b> – they had an active pairing, but have decided to stop participating<b>Never started</b> – they completed onboarding, were paired, but never started meeting</p>	High	<p>In Salesforce, we track their level, and we track who they are matched with and how long they have been working in a specific book. This is done through some custom objects. We are happy to share how this works with vendors preparing proposals.</p>
<b>ONBOARDING</b>		
<p>The Platform must support teacher onboarding. It must provide teachers a tool to indicate their <b>availability</b> (dates and times) to tutor. This tool must account for differences in time zones. In addition, teachers must watch a training video and complete a quiz.</p>	High	
<p>The Platform must support student onboarding. After registration, the students must take a placement test which determines the level in the Confidence and Connections curriculum they will start in. The placement test has specific rules for its administration, such as max number of errors, length of time each question can take, use of audio, among others. Test results should be sent to Salesforce.</p>	High	
<p>The Platform must provide students with the ability to search for a teacher based on gender and schedule availability, with the option to expand the search parameters in the future.</p>	High	
<p>Once the student has selected their teacher, the pair is exclusive, and the teacher becomes unavailable to other students.</p>	High	
<p>The Platform will allow teachers to indicate whether they are willing to be paired with additional student(s) to tutor. The default setting will be that the student-teacher pairing for tutoring is mutually exclusive.</p>	Med	
<p>The Platform will allow teachers to indicate whether they are willing to teach a class of many students (Group Class).</p>	Med	

**Exhibit A - Detailed Requirements (continued)**

<b>Requirement</b>	<b>Priority</b>	<b>Additional Context</b>
<b>SELF-ADMINISTRATION</b>		
Participants can manage their own engagement and profile by: Updating contact information; ending their engagement in the program.	High	
Teachers can move the pair to the next book in the curriculum series. This sends a notification to administrators who then mail the next book to the student.	High	
Both teachers and students should be able to schedule, cancel or reschedule a tutoring session time.	High	
Students and teachers must have the ability to cancel their current match, request a new pairing or stop participation.	Med	Students should be prompted (notified) to find a new teacher if they want to continue
Information must be passed to Salesforce regarding the student-teacher pairing.	Med	
Information must be passed to Salesforce regarding the student-teacher un-pairing.	Med	
Teachers and students should be able to join scheduled tutoring sessions/Group Classes from the platform.	High	
<b>RESOURCES AND LEVELS</b>		
The Platform must store and organize curriculum materials by book and category (i.e. type of resource). Formats include PDF, PowerPoint, links to external websites, Google Slides, Videos, Audio, etc. Students can only access the level they are currently working on. Teachers can access all curriculum levels as teachers teach at all levels.	High	Not sure of amount of storage needed. Most resources are PDFs or links.
There are two progress checks in each book. Students should be able to take the progress checks online, and teachers should have access to their answers so they can be discussed in a tutoring session or Group Class.	High	
As students progress through books they receive certificates of completion and badges.	Med	
<b>COMMUNICATIONS</b>		
The Platform must track and thread admin-participant communications (mass emails, emails, and SMS texts) so that one staff member can review and pick up where another one left off	High	In Salesforce

**Exhibit A - Detailed Requirements (continued)**

Requirement	Priority	Additional Context
The Platform must support messaging between paired students and teachers within the platform (SMS type communication)	High	
The Platform must support auto-notifications to participants regarding key benchmarks (registration, onboarding, course completion, stalled engagement, etc.). This messaging should be customizable in both time intervals and content by the Intercambio staff.	High	
The Intercambio staff would like for auto-notification messages to be available in both email and SMS/text format and to track that these messages are sent (in Salesforce)	High	Cost is a factor here for SMS text. Currently using Mogli SMS. Would need to look at cost to upgrade Mogli for increased number of texts.
Teachers should be able to schedule tutoring sessions within the platform and view all scheduled sessions in a personalized calendar.	High	
The Platform should send notifications to students and teachers reminding them of an upcoming scheduled session. The content and interval of this reminder should be customizable by Intercambio staff.	High	
<b>TUTORING SESSIONS/GROUP CLASSES/VIDEO CONFERENCING</b>		
Tutoring sessions and group classes will be held virtually and the video-conferencing tool should be integrated with the platform and not require users to manage a separate login account in order to access.	High	
The integrated video-conferencing tool must have features for screen sharing, chat, a whiteboard function, and support multiple participants. We are currently exploring enterprise pricing for Zoom.	High	
Tutoring sessions and group class attendance/completion information should be passed to Salesforce, stored in existing custom objects related to contact records	Med	
Auto-payment of tutoring session fee upon scheduling of the session. Track successful and unsuccessful payments. Send notification of unsuccessful payments to admin staff. Do not allow session to take place if payment unsuccessful.	High	Would consider a pre-paid token system to pay for classes ahead and allow for refunds of unused tokens.

Requirement	Priority	Additional Context
<b>ADMINISTRATIVE FUNCTIONS</b>		
Intercambio system administrators must be able to do the following:		Most of these admin backend functions could be in Salesforce. The platform may need a minimal admin backend that isn't SF.
Create participant accounts	High	
Create teacher/student pairings and create group classes with more than one teacher and/or more than one student	High	
Match/Unmatch pairs administratively – including overriding gender requirement.	High	
Deactivate/reactivate, archive/unarchive, delete user accounts	High	
Track and report on tutoring sessions and Group Class sessions - date/time and duration	High	
Assume participant identities in the platform (not SF) for trouble-shooting and tech support	Med	
Have search, filtering functions for participant records on designated data points	Med	
Waive payments to allow for scholarship recipients. Reinstate payments as well.	High	
Change the per <b>session</b> payment fee for students, and support custom pricing for individual students	High	Default fee might change for all, might change for new only, or only for existing students when they move to a new level; classes might have different fees than tutoring sessions
Admin staff will need to message with students and teachers, both individually and in bulk (using filtering functions). Comms should be possible in either email and SMS/text	High	
Ability to create and run reports that can be downloaded in excel	High	
Edit content and time intervals of automatic emails	Med	
Create and update resource categories	High	
Create (upload) resources – both single files and bulk uploads	High	
CMS functionalities: Editing email/text notifications, building quizzes (forms) for onboarding and curriculum purposes (admins only)	High	
Indicate who resources are visible to - students, teachers or both	High	
Add and manage admin users	High	
Ability to track the usage of each resource - how many times it is accessed, who is accessing	Nice to Have	

**Exhibit B - Definition of Terms**

<b>Term</b>	<b>Definition</b>
Availability	During the onboarding process, Teachers select the range of days and times when they are available to tutor.
Book	There are two books for each level in the Confidence and Connections curriculum (except the Intro level, where there is only one book). In CC English, once the student's level is determined, they begin working in the "L" book for that level. When they finish the "L" book, they go on to the "R" Book in the level. When they finish both books, they go onto the "L" book in the next level. When they complete book 5R, they have completed the curriculum and the CC English program.
Class	The series of tutoring sessions that take the student through all the lessons in one book of the Confidence and Connections Curriculum. This term is important in Salesforce.
Group Class	Many students to one or many teachers, with lessons at a set day and time over a finite period (i.e term, semester).
Level	A level refers to where a student is currently placed in the Confidence and Curriculum series. The level corresponds to the amount of English the student knows and is determined by the Placement Test that students take as part of their onboarding process. There are 6 Levels in the Confidence and Connections curriculum series - Intro - Level 5. Students progress through the levels as they complete lessons in the curriculum workbooks.
Pair, student/teacher pair	The exclusive relationship of one teacher and one student using the Confidence and Connections curriculum to study English.
Participant	Collective definition of students and teachers.
Platform	The custom TMS system.
Registration	The process by which a student or teacher creates an account in the Platform and completes a form with contact and demographic information that then creates a contact in Salesforce.
Resource Category	Types of resources for a curriculum book (links, videos, quizzes, etc.).
Session	One meeting, on one day, between one student and one teacher. Also known as a Tutoring Session.
Session Date & Time	The date and time of one tutoring session between one student/teacher pair. Ongoing scheduling of tutoring sessions is flexible and by mutual agreement between the student and teacher.
Student	An adult immigrant studying English. Must be 18 or older and live in the U.S.
Student Onboarding	The process by which a student gets ready to be paired and schedule and meet for tutoring sessions.
Teacher	A volunteer tutoring in one-on-one sessions or teaching a group class. Must be 18 or older and live in the U.S.
Teacher Onboarding	The process by which a teacher gets ready to be paired and schedule and meet for tutoring sessions.
Tutoring	One teacher is paired with one student. They meet regularly for English lessons through a video conferencing tool. They use the Confidence and Connections Curriculum as the basis for the lessons. They develop their own meeting schedule and use the online platform to schedule and meet.