



SALMONID RESTORATION FEDERATION

NationBuilder Custom Event Registration Request for Proposals

ABOUT US

Salmonid Restoration Federation (SRF) is a statewide non-profit that has been working to advance the art and science of habitat restoration in California since 1986. We are based in Garberville, CA and seek the assistance of a consultant or firm to develop a registration page template in NationBuilder that we can use for our annual conferences and other technical education events.

For over thirty years, SRF has hosted an annual Salmonid Restoration Conference in different regions of California. The four-day annual conference highlights regional and topical issues that affect salmonids and their diverse habitats through field tours, technical workshops, panel discussions, and a plenary session on the state of salmonid recovery in California. Additionally, we host several statewide symposia, field schools, and technical trainings every year for the purposes of bringing together the stakeholders who are part of California's salmonid restoration community.

Field tours include all-day visits to dynamic, state-of-the-art restoration sites. Concurrent sessions focus on biological, physical, and policy-specific issues that affect habitat restoration and recovery of native populations of wild anadromous fish. Our plenary session features distinguished keynote speakers including legislators, renowned academics, watershed visionaries, and scientists at the forefront of the restoration movement in California.

BACKGROUND

In 2014, SRF transitioned to NationBuilder with the intention of using it as both a CRM database and an event registration platform. NationBuilder's event registration capabilities have worked well for us when the event only has one ticket level, but we need a registration template that will enable us to create more sophisticated pages with multiple levels of registration options for our constituents.

The following options need to be available on an online SRF Conference registration page:

- A menu of between 9-12 workshops and field tours over a two-day period. The registrant has the option of choosing one per day.
- The option of purchasing tickets to special events, including a membership dinner and a conference banquet. The registrant can purchase more than one ticket, if they are buying for a friend or family member.
- Conference registration fee (separate from the workshops and field tours). There are three levels of conference registration at different costs: Member Registration, Non-Member Registration, and Student Registration. As an alternative, we are comfortable with the option of having a separate registration page for each type.
- The option of purchasing or renewing an annual membership with SRF at the time of payment. In doing so, the person can register for the conference at a discount using the Member Registration rate.

See the next page for an example of the registration page format for our annual conference:

First Name
 Last Name
 Title
 Organization
 Address
 City
 State
 Zip
 Work Phone () -
 Home Phone () -
 Email

Workshops & Field Tours, Wednesday (April 4)

- | | Registration |
|--|----------------------------|
| Yolo Bypass Tour | <input type="radio"/> \$65 |
| Suisun Marsh Habitat Restoration and UC Davis Fisheries Lab Tour | <input type="radio"/> \$65 |
| Community Partnerships for Restoration Workshop | <input type="radio"/> \$65 |
| Fish Passage and Protection Workshop | <input type="radio"/> \$65 |
| | <input type="radio"/> None |

Workshops & Field Tours, Thursday (April 5)

- | | Registration |
|--|----------------------------|
| Putah Creek Tour: Restoring a Natural Hydrograph | <input type="radio"/> \$65 |
| Cosumnes River and McCormack Williamson Floodplain Tour | <input type="radio"/> \$65 |
| Restoring Floodplain Processes to Increase Salmonid Populations Workshop | <input type="radio"/> \$65 |
| Integrated Population Monitoring in California Workshop | <input type="radio"/> \$65 |
| Analytical Approaches to Determine Instream Flow Needs | <input type="radio"/> \$65 |
| | <input type="radio"/> None |

Evening SRF Membership Meeting & Dinner, Thursday (April 5)

- | | Registration |
|--|----------------------------|
| Membership Meeting & Dinner (SRF member) | <input type="radio"/> \$15 |

Membership Meeting & Dinner (Non-member) \$20

Conference, Friday & Saturday (April 6 & 7)

Registration

- SRF Member \$155
- Non-member \$205
- Student (with ID) \$85
- None

Evening Banquet, Saturday (April 7)

Registration

Saturday Evening Banquet \$45

SRF Individual Membership

Membership Level	Amount
Alevin	<input type="radio"/> \$35
Fry	<input type="radio"/> \$50
Smolt	<input type="radio"/> \$100
Jack	<input type="radio"/> \$250
Spawner	<input type="radio"/> \$500
	<input type="radio"/> None

Initially, the support staff at NationBuilder believed that the above registration format would be feasible with minimal coding. Their team of Developers sent us the following code in order to separate the "ticket levels" by day:

```
<h2>Buy Tickets</h2>
```

```
Workshops & Field Tours, Wednesday (April 4)
```

```
<br>
```

```
<br>
```

```
{% for ticket_level in page.event.ticket_levels limit: 4 %}
```

```
<div class="ticket-wrap clearfix">
```

```
<div class="ticket-level">
  {{ ticket_level.form_quantity }}
  {% if ticket_level.description.size > 0 %}
  {% endif %}
</div>
<div class="ticket-description">
  {{ ticket_level.description }}
</div>
</div>
{% endfor %}
```

Evening SRF Membership Meeting & Dinner, Thursday (April 5)


```
{% for ticket_level in page.event.ticket_levels offset: 4 limit: 4 %}
```

```
  <div class="ticket-wrap clearfix">
```

```
    <div class="ticket-level">
```

```
      {{ ticket_level.form_quantity }}
```

```
      {% if ticket_level.description.size > 0 %}
```

```
      {% endif %}
```

```
    </div>
```

```
    <div class="ticket-description">
```

```
      {{ ticket_level.description }}
```

```
    </div>
```

```
  </div>
```

```
{% endfor %}
```



```
{% for ticket_level in page.event.ticket_levels offset: 8 limit: 4 %}
```

```
  <div class="ticket-wrap clearfix">
```

```
    <div class="ticket-level">
```

```
      {{ ticket_level.form_quantity }}
```

```
      {% if ticket_level.description.size > 0 %}
```

```
      {% endif %}
```

```
    </div>
```

```
    <div class="ticket-description">
```

```
      {{ ticket_level.description }}
```

```
    </div>
```

```
  </div>
```

```
{% endfor %}
```

The limit offsets were key here to separate the tickets by day. This code was added below the `<div class="form-wrap"> <div class="form">` code in the event page's template.

Although we were successful with separating the ticket levels by day, we learned that it would not be possible to arrange them in a specific order without additional coding expertise. Once the code was in place, the ticket levels appeared in a seemingly random order with no way to adjust them (a Wednesday workshop listed under Friday, and so on). Additionally, it came to our attention that a "tag" could not be assigned to each ticket level. We had initially been led to believe that it would be possible to automatically assign tags to a person's profile after they registered, which would help us track the number of registrations per conference event and to generate attendance lists for the various workshops, field tours, and special events.

SRF's Program Manager found a temporary solution (temporary because it would be difficult for other staff members to replicate in the future) to the problem of the ticket levels not displaying in the correct order, using the following sequence of steps:

1. Created an event page in NationBuilder with the necessary ticket levels listed under Event Settings
2. Published the page and looked at the source code
3. Used the source code to re-arrange the ticket levels in the desired order
4. Replaced the source code with the liquid code in the event template
5. Published

The Good News: The result was a conference registration page that looked exactly as it should: http://calsalmon.nationbuilder.com/2015_srf_conf_member_registration

The Bad News: When we tested the page we realized that the Paypal checkout process only displayed the lump sum of the registration, rather than a list of the individual events that the person was registering for. Without automatic tagging or a Paypal receipt with the list of events a person was registering for, it would be impossible for SRF staff to determine who was attending what during the four-day conference. Because of this, we had to scrap the NationBuilder registration page and instead asked our website developer to create a custom registration page using Drupal. The Drupal registration page was functional and produced Paypal receipts that were itemized, but it required significant staff time for manual data entry, since the registrations were not automatically populating our CRM database.

WHAT WE ARE LOOKING FOR

SRF seeks an event registration template in NationBuilder that is custom coded to allow for the following:

- Multiple ticket levels separated by day, with the ability to specify the order that ticket levels are displayed in

- Assigning a tag to each ticket level so that when a person registers for a conference event, the corresponding tag is automatically assigned to their profile
- Itemized receipt at PayPal checkout

PROPOSAL REQUIREMENTS

Ideal applicants will have experience working with Liquid Code in NationBuilder and be able to demonstrate success with similar projects. Please include the following information in your proposal:

1. Your qualifications (or the qualifications of the team of consultants) and how the tasks described above would be carried out;
2. Your fee for the proposed work (*Note: We will only consider proposals that include a firm price for completion of the project. Please do not submit an hourly rate*);
3. Your proposed timeline for completion of the project from start to finish. (*Note: Because our conference registration pages need to be ready to go online by the end of November, the project must be completed no later than November 18th, 2015. If you feel that this timeline is unrealistic, please explain why in your proposal*);
4. Your portfolio outlining any previously completed projects that are relevant to this RFP;
5. Resumes of all consultants who would be involved in the project;
6. Names, phone numbers and contact people from three of your clients during the last 18 months, whom we can call on as references.

CONTACT INFORMATION AND DEADLINE FOR SUBMISSIONS

Please submit your proposal no later than October 12, 2015, to Sara Schremmer via e-mail (sara@calsalmon.org) and cc Dana Stolzman (srf@calslamon.org) or mail to PO Box 784, Redway, CA.

If there are questions, please call the SRF office at (707) 923-7501.