



## Evergreen Project Support - Request for Information

### **Purpose**

Evergreen Oversight Board ("the Board") is seeking information from interested non-profit organizations that may be able to fulfill all or some of the Evergreen Project's support requirements.

### **Background**

In 2012, the Evergreen Project ("the Project") and the Software Freedom Conservancy (SFC) entered into a fiscal sponsorship agreement that defines the relationship under which Evergreen acts as a member project of Conservancy. The Board is investigating potential alternatives to the SFC to better meet the Project's needs, particularly to meet concerns with timeliness and responsiveness to questions, particularly regarding, but not limited to, budget.

The Project will need continued support in the following areas:

- Holding and managing finances which includes the ability to generate financial reports
- Legal defense of the Evergreen trademark and copyrights
- Assistance and support in managing conferences and other events for the Evergreen community.

### **Instructions**

Respondents should answer each of the following questions in-line with as much detail as possible. Recognizing that it may not be possible for one organization to fulfill all of the Project's requirements, the Board is willing to consider working with more than one support organization. When complete, please email Sharon Herbert [sharon.herbert@bc.libraries.coop](mailto:sharon.herbert@bc.libraries.coop) Note that each organization has been sent a separate document and url.

### **Questions/Clarification**

Please contact: Sharon Herbert, BC Libraries Cooperative, [sharon.herbert@bc.libraries.coop](mailto:sharon.herbert@bc.libraries.coop) if you have any questions or require clarification. While I will be away from the office July 3-7, I will still endeavour to respond to questions submitted by email as quickly as possible. .

**Deadline for responses: Friday, July 14, 2017 at 5:00 pm Eastern**

# Evergreen Project Support Survey

**Organization Name:**

**Contact Name:**

**Email:**

**Telephone:**

Please respond in-line to the following questions:

1. Accounting and Financials
  - How many FTE's do you have dedicated to accounting functions? What is the level of their professional training?
  - Can you manage invoicing other organizations and vendors in a short time frame (90 day period for the conference)?
  - Can you provide standard financial reports?
  - How quickly can you invoice and refund vendors?
  - Can you share your accounting SOP?
  - Can you provide audited report of your financials for the previous 3 years?
2. Can you provide conference registration and event management services? If yes, please describe.
3. Resources for defending the Evergreen trademark
  - Do you have an attorney on retainer (or on staff)?
  - What are costs (hourly rate) would the Evergreen community expect to pay if we had to defend a legal challenge?
4. Evergreen Marketing and Promotion
  - Can you provide marketing research in support of the Evergreen project?
  - Can you provide support for promoting Evergreen at conferences and other venues?

5. If the Evergreen Project were to form its own non-profit, would you be able to contract for any of the above services?
6. What is your fee structure if you were to act as an umbrella organization? If an Evergreen non-profit were to contract with you for specific services?
7. Have you acted as an umbrella organization in the past and if so, would you be able to provide contact information?
8. Do you have the ability to handle the sale (orders, payment receipt, fulfillment) of fundraising merchandise?
9. Is there any additional information not covered by the questions above that you would like to share?