Request for Information (RFI)
Constituent Relationship Management (CRM) System Selection

DATE OF ISSUE: 2/15/17
DEADLINE DATE: 3/6/17

Applicants are required to submit proposals via email to rfps@familyleague.org. Email submissions must be completed on the date specified in the RFI. The deadline will be strictly enforced. It is the responsibility of the applicant to ensure that the application process is completed by the deadline. Hard copies and late submissions will not be accepted. Furthermore, Family League reserves the right, in its sole and absolute discretion, to amend or modify any provision of this RFI, or to withdraw this RFI at any time prior to contract award. Family League shall not be bound by or liable under this RFI and/or any response thereto until a final written contract has been executed by Family League and the grantee incorporating the terms and conditions of the award.
INTRODUCTION

Since 1991, Family League of Baltimore (Family League) has mobilized resources, empowered communities, and built the capacity of organizations to provide children and families with high quality programs and services that help them reach their full potential. We use our deep experience in resource management to collaborate with stakeholders to improve opportunities across our city. Our goal is that by 2030, all children in Baltimore will be born healthy, succeed academically, graduate high school and transition into higher education and the workforce.

Family League funds over 90 community-based organizations to do this work, and utilizes data to effectively measure these outcomes. In 2017, Family League granted $16,925,000 to organizations to help fulfill its mission of creating lasting outcomes for children and youth.

You can learn more about the organization by visiting http://familyleague.org/.

BACKGROUND AND PURPOSE OF THIS INVESTMENT

Family League of Baltimore is using a Request for Information (“RFI”) to select a Constituent Relationship Management (CRM) System. The goal of this RFI is to select an off-the-shelf solution(s) that will require minimal configuration and can be implemented quickly and cost effectively. Family League currently has 54 full-time employees; the CRM system will be administered by the Business Systems team within IT and used across the organization, to include the Executive Office, Advancement/Development, External Relations, Funded Partnerships, as well as other teams across the organization.

The success of the project will be measured on how the solution meets Family League’s goals for the project as follows:

Fundraising
Family League is interested in diversifying revenue streams and has a desire for a system to manage the following programs:

- Foundations
- Individual Giving
- Major Gifts
- Planned Giving
- Corporations
- Capital Campaigns
- Events

Relationship Management
Family League has different relationships with the organizations, partners and constituents with whom it serves and interacts. The system must be able to accommodate relationships as listed below:
• Board of Directors
• Political relationships (ex., Baltimore City Mayor’s office)
• School system relationships (Principals, Administration, etc.)
• Foundations
• Donors
• Volunteers
• Corporate relationships
• Funded Partners
• Government
• Personal relationships with Senior Staff who are viewed as influencers
• Individuals
• Others

In addition, the CRM system must have the capacity to manage and communicate with “prospects” or “friends” of the organization with no formal relationship with Family League.

Email communications
Family League requires tightly integrated functionality (as part of CRM or a third-party tool) that can communicate with all segments of the database. Reporting and analytics are also a requirement in terms of understanding deliverability, open rates, click-throughs, action taken, etc. At a minimum, the system must provide the ability to create and update segmented lists, recruit subscribers, customize emails by subscription category, and embed multimedia information.

Text (SMS) Capability
Family League requires a text messaging service to be able to send or schedule text messages to a list of subscribers. That list would be stored, managed and updated inside the CRM solution. The system should be able to track metrics such as link clicks, opt-ins, opt-outs, delivery rates and message replies. If the vendor does not provide such a service as part of the core offering, indicate your ability to exchange data with a text messaging platform.

In addition, the solution should:

• implement multiple keywords for different campaigns
• maintain a high message credit limit (the number of inbound text messages in a given month)
• program auto-responses to inbound messages, depending on keyword
• capture basic information (name, address, school, phone, etc.)
Events
Family League is heavily involved in either sponsoring or participating in a variety of events. For the purposes of this RFI, an event can range from a large annual gala to smaller, community based meetings and everything in between.

If there is a financial transaction involved, the system should accommodate every facet of that work flow to include capturing payment to documenting payment on the constituent record.

No matter what the level of event, Family League desires to capture all pertinent event information and document it inside the CRM system.

Grants Management System Integration
Family League uses Fluxx, a grants management system, to manage the process of bringing partners (State, City and private funders) to the table to make strategic, coordinated investments in programs that make a real difference in the constituents they serve.

The CRM system is not required to perform typical grant management software functions but should integrate with Fluxx to exchange pertinent funder and funded partners as required by the organization.

Professional Development (Learning Management Systems)
Family League provides professional development workshops and training as part of the programs they manage. An example would be Community Teacher that would fall under the Community Schools and Education program. The course is described as follows:

“This workshop will work with teachers and youth development professionals to develop the knowledge of the community, identity, and culture of the children and families that they serve, then draw on that knowledge to strengthen their practice.”

Ideally, these opportunities are listed via a professional development calendar on the Family League website. Individuals would be able to register for training via this site and their participation would be recorded in the CRM system. At this point, the training is provided at no cost but there is a cost associated with no shows.

Family League requires that the courses and their participant be recorded accurately and in a timely fashion. Reports regarding participation by individual and organization are also a requirement.

Transactions History
Family League requires that all transactions be stored in the CRM system. At a minimum, those would include donations, grants, payments (ticket sales), sponsorships and other financial transactions.
Advocacy
Although not a large effort for Family League today, the CRM system should include or be able to integrate with a best in class advocacy package.

Social Media
The CRM system should accommodate being able to document social media accounts and be able to store and report social media activity on the constituent record.

Reporting
The CRM system should provide out-of-the box reporting regarding statistics relative to Family League activity. This reporting could be centered around relationships, donor history, activity history or touch points with influencers in the community. Customized reporting should be available if deeper and more complex reporting is required. Family League requires a dashboard of the top-level metrics of constituent engagement. The presentation should be simple and aligned to the metrics that senior management is tracking.

Prospecting
Although not currently a prioritized strategy at Family League, the CRM system should account for a process or protocol by which prospects can be tracked and marketed to in a professional and automated manner. Family League desires a moves management type system that will track individuals or corporations as they move from suspect to prospect to donor to major gift to stewardship.

In addition, any research tools for Foundation and or wealth screening type research must be able to integrate with the off the shelf system.

E-commerce
The CRM system should accommodate E-commerce capability with an eye towards an increase in volume and variety. These transactions can include event payment, gift transactions, corporate sponsorship and other types of financial transactions.

Web site
Family League may also need to consider a new web platform as part of a broader CRM system selection. Ideally, web site traffic could be attributed to a record to understand constituent’s behavior while visiting the site.

Accounting
Family League use Abilia as its financial management system. Family League is interested in a CRM system that can work closely with its accounting system and enable automation and work flows in order to reduce staff time and manual processes.
Family League is beginning this process via a Request for Information (RFI), described in this document. This RFI does not commit Family League to contract for any services or guarantee that a Request for Proposal will be issued. Family League will not accept any unsolicited proposals for this or related projects. Respondents are advised that Family League will not pay for any information or administrative costs incurred in response to this RFI; all costs associated with responding to this RFI will be solely at the interested party’s expense.

Assuming that Family League finds a suitable solution, this project has a pre-approved budget, and the selection committee is comprised of its senior management. Family League has also agreed to dedicate committed full time resources (staff and/or a third-party consultant) through the selection and implementation processes to ensure the process moves smoothly and at a reasonable pace. Family League is also committed to evaluating and restructuring internal processes where necessary to avoid unnecessary configurations.

Family League has retained Hartman Executive Advisors to manage the selection process, in conjunction with its Funded Partnerships team. As such, all vendors are expected to communicate only with the designated Hartman consultant and/or designated Funded Partnerships staff person through the duration of this process.

System Selection Overview
System selection begins with the initial RFI process to determine which vendors may have capabilities in line with Family League’s needs. Interested vendors shall provide general information about their solutions, taking into consideration the information detailed previously in this RFI. At this point, Family League is only looking for general information and pricing.

Family League understands that the final costs will require additional discussions, scoping and estimations. At this time, we are interested in your initial solution recommendations, general pricing structure and support philosophy with some representative prices, where possible, to help us evaluate the overall scale.

It is our intent to move quickly on the evaluation and ideally complete the selection for a new vendor by April 2017.

Evaluation Process
The initial responses will be reviewed, with the expectation that many respondents will be invited to perform a general presentation and discuss the key solution elements outlined in this RFI. As Family League is willing to consider a broad range of software providers, we would like the vendors to focus on their value proposition, and how the solution that they suggest best meets the key components of what Family League is seeking in a CRM system. Where possible, examples of similar projects are encouraged.

Following the initial presentations, Family League will select those vendors who have services and experience they believe could most effectively serve our needs. At that point, Family
League will prepare more detailed scenarios to be demonstrated and meet with the finalist vendors to discuss your specific solution recommendations.

While Family League’s business requirements are relatively straightforward, this will provide the vendors with the opportunity to configure their approach based on the organization’s specific business requirements.

Assuming Family League has identified one or several qualified candidates, those vendors will then be asked to submit a proposal to include final estimates for solution deployment, hosting, licensing, and any other related project costs. Family League will evaluate the proposals and make a decision regarding the next steps of the process at that time.

**VENDOR SELECTION PROJECT DETAILS AND SCHEDULE**

By using the RFI process it is our intent to minimize the amount of initial work required of interested vendors to allow for a streamlined selection process. Vendors will only be asked to provide detailed and customized responses once they have been determined to be a strong candidate for selection. We expect that this narrowing of finalists, coupled with Family League’s flexibility in achieving their needs, will enhance final candidates’ ability to quickly turn around a detailed proposal.

The following schedule is a general outline of the process steps with estimated completion dates for each task. These dates may be adjusted through the process as long as it doesn’t endanger the overall completion date. By participating in the initial RFI process, vendors are agreeing that they can adhere to the following general timeline and the meeting times they reserve through this process. Depending on vendor availability and capabilities we are open to accelerating the selection timeline.

<table>
<thead>
<tr>
<th>Task</th>
<th>Completion Date</th>
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</thead>
<tbody>
<tr>
<td>RFI distributed to Vendors</td>
<td>02/15/17</td>
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<tr>
<td>Deadline for Questions</td>
<td>03/01/17</td>
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<tr>
<td>Vendors respond to RFI</td>
<td>03/06/17</td>
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<tr>
<td>Analyze bids / select finalists</td>
<td>03/10/17</td>
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<tr>
<td>Initial vendor presentations start</td>
<td>03/20/17</td>
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<tr>
<td>Initial vendor presentations end</td>
<td>03/24/17</td>
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<tr>
<td>Notification to finalists and scheduling for proposal and final presentation</td>
<td>03/31/17</td>
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<tr>
<td>Final presentations start</td>
<td>04/10/17</td>
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<tr>
<td>Final presentations end</td>
<td>04/14/17</td>
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<tr>
<td>Follow-up questions to vendors</td>
<td>04/17/17</td>
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<tr>
<td>Vendor(s) provide final proposal</td>
<td>04/21/17</td>
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<tr>
<td>Vendor selection and schedule discussion</td>
<td>04/26/17</td>
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*Family League of Baltimore Request for Information (RFI) – CRM System Selection*
DESIRED VENDOR QUALIFICATIONS

- Proven project management techniques;
- History of on-time, on-budget engagements;
- Responsive and knowledgeable support team;
- Solution that meets essential functional needs but emphasizes simplicity, ease of use and ease of maintenance;
- Strong reference base with similar projects/organizations; and
- At the proposal phase - cost effectiveness of the approach.

RESPONSE REQUIREMENTS

Vendors interested in pursuing this project should provide Family League with the following information:

- General background for the company including staff size, locations and years in business;
- General information on the solution to be proposed including any standard literature as applicable – response should describe all elements of the solution including components provided by partners. Please include how these components will work together;
- A reference list of similar-sized non-profit trade association clients if possible;
- General pricing methodology (standard license and hosting structure, hourly rates, support fees, etc.; and
- Other general information you may deem applicable.

Responses should be submitted electronically (i.e., Word or PDF) to rfps@familyleague.org. Email submission must be completed by March 6, 2017. Faxed, mailed, or hand-delivered responses will not be accepted.

Direct any requests for information or clarification regarding this RFI in writing via email to rfps@familyleague.org. The deadline for submitting questions is March 1, 2017. Answers to all submitted questions will be posted on Family League’s website http://familyleague.org/.

GENERAL TERMS AND CONDITIONS

Award
The submission of information and/or proposal does not, in any way, guarantee an award. Family League is not responsible for any costs incurred related to the preparation of a response and/or proposal in relation to this RFI. Family League reserves the right to withdraw an award prior to execution of a contract with a vendor in Family League’s sole and absolute discretion.

Contract Terms & Conditions
The successful applicant must comply with all terms and conditions applicable to consultant contracts executed by Family League. These terms and conditions can be found on the Family League of Baltimore Request for Information (RFI) – CRM System Selection
League website at www.familyleague.org. By submitting a response and/or proposal to this RFI, applicants attest that they have read and accept these conditions fully. A Scope of Work with details about specific requirements and measurable outcomes will be a requirement of the vendor as a component to the contract.

**Additional Funder Conditions**
Any additional terms and conditions imposed by funders following the release of this RFI shall become a part of the contract between the vendor and Family League.

**Confidentiality**
All information included in this RFI is confidential and only for the recipient’s knowledge. No information included in this document or in discussions connected to it may be disclosed to any other party.