



From: Scott Hagerty

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Re: CRM Requirements for ICIC

Initiative for a Competitive Inner City (“ICIC”) is seeking a partner to help implement an organization-wide Customer Relationship Management system (CRM) within the next 6 months.

Key Areas:

- ICIC utilizes multiple platforms to manage many aspects of their organization, including fundraising, nominations and applications to programs for Inner City businesses, events, and digital communication to donors, participants, and partners.
- ICIC is looking for help developing data governance and subsequent user adoption and knowledge management.
- ICIC is looking to expand its current fundraising activities to include the pool of program alumni and partners.

You have been selected as a vendor to respond to this request and we would like to ask you to prepare a proposal to accomplish the task that includes timeline, cost, deliverables, and other requirements mentioned below. The following RFP includes a background of our organization and describes the purpose of the project, its desired functionality, and specific requests relating to the proposal. We understand that details and features may be subject to change upon vendor recommendation and / or research of preferable solutions. In your proposal, please feel free to suggest alternatives where noted.



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Guide to this RFP

Our expectation is that this document will convey our vision for the new CRM and specific challenges with existing systems. It includes a background section about our organization, required features of the new system, and desired technologies. In providing these details, our intent is not to convey that we have all of the answers in creating the best possible system. The ideal and preferred vendor will bring their own ideas and vision based on industry expertise, technical capability, and client relations, guiding us to incorporate our goals into that vision. **Please feel free to email shagerty@insourceservices.com** with questions or comments.

Project Overview

ICIC historically utilized Blackbaud Sphere (a Kintera product purchased by Blackbaud and for which support is ending) for many of their CRM needs, from development and communications to program applicant tracking. A wide array of other software is also utilized; SmartSheets, SugarCRM, SurveyGizmo, Access databases, MailChimp, EventBrite, and Excel spreadsheets are used to varying degrees, across departments and programs.

ICIC is looking for a solution that is highly configurable and would have the ability to capture and track engagement with three audiences: donors, program participants, and collaborative partners. An ideal solution would allow for easy segmentation of those audiences by a variety of characteristics, while maintaining flexible confidentiality regarding financial and other sensitive data, between programs. ICIC wants to enable internal teams to more effectively coordinate communication to various audiences, and if possible to manage donor and program participant pipelines through customized stages.

Background

Initiative for a Competitive Inner City is a research and strategy organization and the leading authority on U.S. inner city economies and the businesses that thrive there. ICIC's mission is to drive economic prosperity in America's inner cities through private sector investment to create jobs, income and wealth for local residents. ICIC strengthens inner city economies by providing businesses, governments and investors with the most comprehensive and actionable information in the field about urban market opportunities. To support its purposes, ICIC receives funding from corporations, foundations and private individuals.

Research & Advisory Practice

The research and advisory practice at ICIC conducts relevant research on inner city economies, including clusters, business performance and general economic conditions, that are data-driven and grounded in economic theory. Our advisory work is focused on helping cities increase the economic opportunities for residents of their inner cities and catalyzing large organizations to strengthen their role as anchor institutions.

ICIC utilizes a proprietary database in our research and advising projects as well as for cross-organizational purposes. This database, State of the Inner City Economies (SICE), maps the economic



performance, business vitality and resident prosperity of all American cities with a population greater than 75,000.

URBAN BUSINESS INITIATIVES

ICIC offers leading programs designed to serve inner city CEOs in the urban core. These initiatives deliver education, training, and capacity building, as well as providing critical resources, tools, visibility and content year-round through our digital platforms.

Inner City 100

The Inner City 100 (IC100) identifies and recognizes 100 of the fastest growing private inner city companies, which are creating jobs, income and wealth for local residents. The yearlong effort to find these companies involves a wide network of mayors, economic development officials, business service providers and other nominating partners from across the country. Winning companies are ranked and profiled in FORTUNE magazine. Winners are also invited to attend the Inner City 100 Conference and Awards held annually in Boston, Massachusetts.

In partnership with ICIC's research team, IC100 conducts an extensive annual survey of winning companies on a variety of topics ranging from workforce and capital issues to customers and business strategy. ICIC uses the data collected to uncover trends among this subset of fast-growing urban companies to determine both business and policy implications.

Inner City Capital Connections

Inner City Capital Connections (ICCC) is a national program designed to stimulate capital flow to underserved inner city markets by educating inner city business leaders and matching them with investors. The program begins with a 40-hour executive education training day followed by a series of webinars that deepen the learnings from the training day, as well as virtual coaching sessions to help businesses perfect their capital pitch. The program culminates in a national capital matching conference at which participants continue to learn, network, and meet with potential capital providers.

In order to advance our understanding of opportunities and challenges in inner city capital markets, each year ICCC surveys past attendees to discover how capital providers view inner city opportunities, and whether inner city companies have accessed new growth capital since completing the program.

Goldman Sachs 10,000 Small Businesses

ICIC partners with Goldman Sachs and Babson College on the *10,000 Small Businesses* (10KSB) initiative to provide quality expertise and effective program support. The program provides education, mentoring, technical assistance and capital access to underserved businesses and their CEOs at no cost to the business. ICIC oversees the outreach, recruitment, application and selection phases of the program in all the local cities and the national blended program. The curriculum focuses on practical skills that small business managers can immediately put into action within their company. Each of the programs are delivered through a local community college. The local team is also responsible for regional outreach and recruitment activities with ICIC serving as a strategic advisory partner.

Santander Cultivate Small Business

Cultivate Small Business (CSB) is designed to help early-stage entrepreneurs in low-income neighborhoods build and sustain their businesses, with a focus on women-, minority- and immigrant-owned businesses in food-related industries. The program provides industry specific education, networks and mentoring as well as small capital grants for business owners.



CSB is funded by Santander Bank, with whom ICIC partners to plan and execute the program. The education component of the program is conducted through a mixture of in-class and online sessions. During this time, participants are connected to mentors in the food industry, as well as coaches from Santander that can assist them in the execution of their action plans.

Project Goals

Migrate ICIC to a more robust CRM application that has more integration features and ease of management. Such a CRM would be highly configurable and would be able to track, manage, and report on interactions with ICIC's three main audiences. If additional modules or products are necessary for mass electronic mailings or other functionality, easy or automated integration with such additional components would be ideal. It should enable collaboration between programs to be segmented to protect sensitive data, when captured by application or referral processes.

These changes will enable internal ICIC staff to access data more quickly and in a coordinated manner and will enable the organization to track constituents more easily and ultimately to provide them with better information. Once this is completed all appropriate staff will be able to easily access constituents' information and run reports on the CRM's contents, enhancing the ability to deliver better reports and information to management and funders and better service to program participants.

Successful Outcomes

1. Reporting capabilities that allow for full segmentation of all data ICIC tracks.
2. Functionality for critical requirements addressed within CRM or closely-integrated platform(s)
3. ICIC staff are trained and comfortable with new workflows, supported by internal or vendor resources
4. Clear data governance and usage guides

Feature Requirements

Functionality or Program	Feature Requirement
General	<p>Critical</p> <ul style="list-style-type: none"> ● Meet ICIC data security requirements: encryption, secure transmission, etc ● Restrict access to data per program ● Allow different data to be visible to different employees, based upon permissions, when viewing a record or provide alternative method of segregating some but not all record information between departments. (Additionally, be able to change or modify permissions without development needed) ● Can upload bulk changes or new records <i>en masse</i> without creating duplicates ● Show how a contact or an organization has participated in programs across ICIC ● Track interactions with contacts ● Ability to create/modify and save custom reports that query the database (dependent on permission level) ● Ability to query database on fly (simple queries) ● Merge/delete duplicates with ease ● User-friendly interface ● High quality Customer Support and Training resources <p>Important</p> <ul style="list-style-type: none"> ● Prevent or warn against attempts to create duplicate record creation ● Non-applicant partners (mentors, nominators, conference attendees) can be tracked, and past employment and relationships documented ● Alert thresholds can be set on specific criteria ● Track data based on individuals and companies – individuals who move from one business to another can retain linked histories ● Integrate with corporate email system (Office 365) ● Segmentation according to custom/customized fields ● Ability to schedule custom reports to go to user inboxes (e.g. if ICC program wanted to give a summary report of number of applications accepted by city and have this sent automatically to Steve every Monday morning). ● Ability to anonymize data for reporting to people that may not have detailed access. i.e. Counts on businesses within x requirements that are otherwise inaccessible ● Data validation on organizations, i.e. updated address, name, etc. ● Restrict access not just to viewing but Read, Read/Write, Read/Write/Delete, etc. ● Customizable required fields ● Create call lists with quick notes (custom view/quick entry) <p>Nice to Have</p> <ul style="list-style-type: none"> ● Geocoding support ● Restrict access to data per level, with flexibility for changes ● Future ability to txt, capture cell phone data and provider ● Future ability to send auto reminders, email, txt, etc. ● Text reminders for events, applications, etc. ● Mobile-friendly ● Generate unique URLs per record, allowing one to quickly send coworker a link to a specific record with a question or comment ● Data capture of website visitors' behavior ● Cloud-based ● Schedule meetings and conference calls, showing availability to external parties

Applications to UBIs (Programs)	<p>Critical</p> <ul style="list-style-type: none"> ● Track progress of parties through a customizable pipeline, from nominee to applicant to participant (or drop) to alumni and on ● Track nominators and associated nominees, and information about both parties ● Record eligibility statuses for applicants, after manual checks are performed ● Record selected statuses and outcomes for applicants ● Report on outcomes and other variables ● Capture documents or data submitted via custom websites or survey tools (esp. SurveyGizmo) ● Designate cohort membership(s), cross-reference by other attributes (sites) <p>Important</p> <ul style="list-style-type: none"> ● Link to or otherwise associate external documents with applicant records ● Ability to group program participants by cohort <p>Nice to Have</p> <ul style="list-style-type: none"> ● Automate eligibility checks for certain nominee/applicant attributes ● Cross-program eligibility checks-- e.g. we upload an excel list of businesses and can see which program the business would be best suited for--maybe even notifies the respective UBI team. ● Automate eligibility checks for geographical locations (ArcGIS) ● Workflow management: Business based rules that trigger other events (e.g. notifications sent when someone has been sitting untouched in nominee queue for X weeks, etc.)
Mass Mailings	<p>Critical</p> <ul style="list-style-type: none"> ● Reach out to lists of email contacts or integrate closely with a Marketing Platform capable of doing so ● Segment possible recipients according to customized criteria ● Easy ability to review the criteria used for segmentation/campaigns ● Show recent contact dates, content, etc ● Generate static and dynamic lists for Campaigns, save lists, and copy lists to new campaign(s) <p>Important</p> <ul style="list-style-type: none"> ● Reusability of past resources for campaigns, templated messages, mailing lists ● Prevent duplicated or multiple mailings to unsubscribed or multi-program participants ● Ability to review past mailings and outreach to targeted recipients ● User-friendly Do Not Call/Do not Contact functionality for ICIC staff ● Tracking leads/conversions ● Track what caused lead conversion, i.e. mailing, phone call, website for events and other .. <p>Nice to Have</p> <ul style="list-style-type: none"> ● Link marketing platform data back to record in CRM, i.e. number of emails viewed, for how long, if they forwarded, etc. ● Email Templates

Events (and Webinars)	<p>Critical</p> <ul style="list-style-type: none"> ● Capture event registrants (sometimes registered by third party) as specified (all or subset of registrants/attendees) <p>Important</p> <ul style="list-style-type: none"> ● Capture registration details (ticket level/price, registration code, referrals etc) ● Event registration that interacts with CRM ● Pre-Event registration (User friendly event registration) ● Post event communication ● Data capture at events using technology ● Analytics on event attendance ● Ability to upload attendance and/or take attendance as a class/group (e.g. select the 2 individuals from a group that <i>did not</i> attend as a way of taking attendance) <p>Nice to Have</p> <ul style="list-style-type: none"> ● Forms and Surveys ● Automated Event communication to attendees ● Print name tags ● Business card reader/scanner application ● Ability to take attendance by class and to use attendance to drive other work processes (e.g. contact all those who have taken fewer than x webinars)
Development	<p>Critical</p> <ul style="list-style-type: none"> ● Record and track giving history, including different types of giving and in-kind gifts ● Giving history documentation, track communication and documents ● Ability to capture non-email correspondence (calls, in-person meetings) ● Moves management for individuals - Lead, qualified prospect, donor, referral source, etc... record all interactions with external party <p>Important</p> <ul style="list-style-type: none"> ● Supporter wealth screening analysis tools (ResearchPoint functionality) or ability to integrate with a third-party product providing such functionality ● Online giving capabilities or ability to integrate with third-party online giving product ● Create dashboards and custom reports for individual “gift officers,” ICIC management, and board reporting ● Project management support for assigning tasks/responsibilities, in particular with cross-functional fundraising efforts ● Capture cross-party relationships (e.g. alumni doing business together, family ties between two different companies) <p>Nice to Have</p> <ul style="list-style-type: none"> ● Automatic receipts for online donations ● Facilitate online alumni portal ● Batch import/upload of giving transactions, including different types of giving

Scope of Work

- Project management
- Process strategy
- Mobile device optimization
- Testing & quality assurance
- Software training
- Ongoing Support / Retainer
- Timeline for Completion
- Deliverables

Technical Requirements

Integrations

- Email Marketing Integration or Functionality within the CRM
- Survey Platform Integration or Automated Data Transfer
- Event Management Integration or Functionality within the CRM
- Geo-tagging and Location Analysis Integration or Functionality within the CRM

Key Abilities

- Tracking and Managing Potential Donors
- Nomination and Application Pipeline Management
- Segmentation of Constituent Audiences for Reporting or Outreach
- Security of Sensitive Data
- Upload or Modify Records in Bulk without Duplication

Project Timeline

Topic	Description	
RFP sent to vendors	Draft and send out RFP for possible solutions	July 2018
RFP vendor review and vetting	Interview vendors to assess availability, costs, process, bench depth, expertise.	August 2018
Vendor selection	Evaluate and choose vendor	August - September 2018
New platform set up	Development & customization of new platform	September - December 2018

New platform goes live	New platform (phase 1) set up completed, data migrated, ICIC users trained	January 2019
Phase Two Customization and Development	Develop and implement full platform capabilities and integrations not included within initial deployment scope	February - TBD 2019

Criteria for Selection

- Functionality of proposed solution
- Examples of similarly-complex projects
- Client references (via phone)
- Project timeline with major tasks and milestones
- Project budget by line item

Company information

- Years in business
- Company awards and certifications
- Number of full time employees
- Bios including tenure of employees assigned to this project
- Number of active clients/projects
- Location of staff who will be working on this project
- Will sub-contractors be utilized?

Format & Proposal Details

1. Assessment quote for a fully priced and scoped deliverable
2. Implementation process
3. Implementation phases and estimated timelines
4. What feature requirements will be addressed, and which ones will need to be met from external systems (please identify those external systems and describe integration functionality if possible)
5. What you need from ICIC
6. Resumes of key personnel involved in the process and tenure at your company