



REQUEST FOR PROPOSAL

CRM PROJECT – INITIATION PHASE

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I. INTRODUCTION

Now in its 27th year, the Food Bank For New York City (Food Bank) is the New York City's largest hunger-relief organization working to end food poverty throughout the five boroughs. As the city's hub for integrated food poverty assistance, the Food Bank tackles the hunger issue on three fronts — food distribution, income support and nutrition education — all strategically guided by its research. Through its network of approximately 1,000 community-based member programs citywide, the Food Bank helps provide 400,000 free meals a day for New Yorkers in need. The Food Bank's hands-on nutrition education program in the public schools reaches thousands of children, teens and adults. Income support services including food stamps, free tax assistance for the working poor and the Earned Income Tax Credit put millions of dollars back in the pockets of low-income New Yorkers, helping them to achieve greater dignity and independence.

As an independent, nonprofit 501 (c)(3) organization, the Food Bank meets the Better Business Bureau's charity standards. The Food Bank is a certified member of both Feeding America and the Food Bank Association of New York State.

Currently the Food Bank's valuable data is being collected in a variety of Access and Sequel databases, which are all stand alone, forcing staff to duplicate efforts and lacking a full 360 view of our constituent relationships. We are looking for a system to maximize the impact of and capitalize on each of the Food Bank's relationships and streamline information to paint a picture of our valuable constituent base.

II. GOALS

The goal of this RFP is to solicit a consultant to work with the Food Bank to conduct a thorough strategic CRM assessment; provide a CRM analysis report and goal definition; and create an RFP for the identification of a vendor who will design, develop or customize a CRM platform for the Food Bank. This CRM should take all Food Bank constituents into consideration including, but not limited to, and in no particular order:

- Food Bank member agencies
- Food Bank clients and their interaction with our Food Stamp outreach and enrollment programs, Tax assistance and Community Kitchen and Food Pantry
- Food Bank Public School partners in our CookShop program
- Food Bank advocates
- Food Bank volunteers
- Food Bank financial donors, including individuals, foundations, corporations
- Government partners and funders
- Food donors
- Business partners and corporate sponsors
- Vendors

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Strategic CRM Assessment - Consultant will facilitate the assessment of Food Bank's needs and expectations with detailed interviews with key stakeholders. Questions should be designed to gain insight into the Food Bank's program areas, priorities and initiatives in order to create a Strategic CRM Plan customized to the Food Bank's needs. Consultant will conduct an analysis of all existing Food Bank databases and tools as well as other CRM solutions on the market, including, but not limited to the United Way's Microsoft Dynamic "BEN" CRM, Social Solutions' ETO, Blackbaud Enterprise and Salesforce.

Strategic CRM Analysis Report and Goal Definition – Consultant will synthesize and analyze information gathered during the assessment to produce a document that can serve as a realistic goal definition and roadmap for the CRM selection, implementation, with possible phasing taken into consideration. The analysis will identify opportunities and potential challenges, recommendations, best practices and ideas to ensure success.

RFP Creation – Based on Food Bank's needs and specifications, consultant will create an RFP to identify a vendor who will design, develop or customize a CRM platform for the Food Bank.

Vendor Assessment Based on responses to the RFP, selected respondents will be invited to present succinct and targeted demonstrations. Based on the results of those demonstrations, selected vendors will be asked to provide proposals. Consultant will assist Food Bank's selection of the vendor.

The CRM that we envision for the Food Bank, whether built from scratch or tailored from an "off the shelf" or licensed product will entail *at a minimum* the following key components:

- The ability to integrate with other databases for reporting and communications purposes;
- The ability to run queries and generate reports that capture client related encounters across multiple programs and organizations;
- The ability to easily have fields added to it and be scalable for growth; and
- Have the sufficient security structure and back-up mechanisms to ensure safe housing of data.

III. WHO MAY APPLY

This RFP is open to all technology consulting firms, for profit or not-for-profit entities that have significant successful past experience in serving in a similar capacity relating to the scope of services outlined above.

Applicant Preferences Factors

It is anticipated that the successful consultant would possess the following:

- At least 10 years of successful technological project management experience working on database development for not-for-profit social or human service organizations;
- Demonstrated knowledge of "off the shelf" or licensed CRM systems that have a case management focus for not-for-profit social or human services organizations;
- Demonstrated experience designing and building custom CRM database driven applications;

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- Demonstrated capacity of ensuring high levels of customer satisfaction for services delivered; and
- Demonstrated ability to write succinct reports and make formal oral presentations about complex technological issues in layman's terms.

IV. INSTRUCTIONS TO RESPONDERS

Food Bank Contacts

Lydia Alvarez
Director of Operations
Food Bank For New York City
39 Broadway, 10th Floor, NY, NY 10006
LAlvarez@foodbanknyc.org
(212) 566-7855 x8084

Confidentiality

Vendor acknowledges that this RFP is subject to the Confidentiality Agreement previously executed by Vendor and Food Bank For New York City. The Request for Proposal and any related documents, information and discussion are to remain the sole property of Food Bank and must be kept confidential.

Format and Requirements for Submission

Title Page – This is to include your Company Name, Address, Contact Name, Title, Signature, Date, and Phone of principal or company.

Executive Summary – The Executive Summary is an overview of your response to the goals outline above, including an estimated length of time to complete. Utilize this area to summarize major points and outline the benefits your company will provide to Food Bank.

Price Proposal – Please provide a summary narrative of your price proposal and budget and how the amounts were derived. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees. Price proposals and respective budgets will be evaluated and considered in terms of their cost effectiveness.

Applicant History and Background - Please provide an overall global picture of your company's history and background information. This should include a description of where the offices are located, number of years your company has been in operation, and the geographic location of where services have been and currently are provided. Describe the structure of your company, how many employees it has, its key personnel, and its ratio of male to female employees and its demonstrated commitment to diversity.

Experience/BIOS - Please list the names and provide biographical information of personnel who will be assigned to work with the Food Bank. Include any certifications or credentials. Describe proposed key staff qualifications and experience in providing relevant services as they relate to the scope of services. Specifically address the following:

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- Describe in detail your company's experience in providing technological consulting services and experience creating custom applications that solve business solutions.
- Describe in detail your company's familiarity of client relational management systems in general and of specific products that are in the market place today that can potentially serve the outlined needs of Food Bank and its membership.
- Describe in detail your company's past experience in serving as a project manager overseeing the development of a CRM system, including case studies.

Contract - Please submit a proposed agreement with any specific Terms and Conditions or business related assumptions you will require. Selection of a Vendor does not constitute acceptance of any form contract or terms and conditions submitted by that Vendor.

References - Provide the contact names of two recent clients where similar services outlined in this RFP were provided, such as other not-for-profits, companies of the same size or characteristics, who will serve as references. The references must be willing to talk informally with Food Bank's evaluation team. Please include the Name of the Company, a Contact Name and Title, Contract Address, Phone number or email address, and a very brief description of the project.

Financial Information - Provide 3 years Audited Financial Statements.

Submission Receipt – Bidder shall submit proposal via email in PDF, signed by suitable authority, to Lydia Alvarez, LAlvarez@foodbanknyc.org. Submissions received shall be assumed to be valid for a period of ninety (90) days following the due date.

Questions – all questions should be referred to bids@foodbanknyc.org, due by March 9th, 2012.

- All responses to questions will be aggregated and emailed out to all potential applicants within 3 business days of receipt of questions.
- Selected vendors will be invited for a formal interview before a review panel where they will be asked to make a presentation that further elaborates on their capacity, history and experience in relationship to this project.

V. APPLICATION TIMELINE

3/2/12	Application Period Opens
3/9/12	Questions Due
3/22/12	Proposals due to Food Bank
3/29 -4/5/12	Selected proposal presentations
4/16/12	Contract awarded
4/23/12	Contract begins

VI. PROPOSAL EVALUATION AND CONTRACT AWARD PROCEDURES

Evaluation Procedures

A committee of Food Bank reviewers will evaluate, rate and rank in descending order of their technical rating all applications based on the Evaluation Criteria prescribed below.

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Overall Evaluation Criteria

- | | |
|---------------------------|-----|
| • Demonstrated Experience | 50% |
| • References | 25% |
| • Price Proposal | 25% |

Areas of Consideration

- Experience working with not for profit organizations.
- Knowledge of nonprofit constituent relationship management systems (CRM).
- Experience managing large projects; strong project management experience.
- Experience leading requirements gathering exercises.
- Exceptionally strong communication skills.
- Proposed team's experience as it relates to this RFP.
- Customer references.
- Cost.

Basis for Contract Award

Food Bank For New York City is a charitable organization. Award selection will be based on the best technically rated application in combination with a preferable price proposal and such other factors or criteria which are set forth in this RFP. Greater consideration will be given to qualified applicants who:

- Clearly demonstrate both an understanding of and commitment to supporting the Food Bank's hunger relief efforts;
- Show an active commitment to diversity in all forms, which is demonstrated through the organization's staffing and culturally competent practices.

VII. ADDITIONAL INFORMATION

Right to reject

Food Bank reserves the right to accept or reject any proposal and to annul the proposal process and reject all proposals at any time prior to the notification of the award of contract, without incurring any liability to the affected bidder or bidders or any obligation to inform the affected bidder or bidders of the grounds for Food Bank's action.

Gratuities

Vendor shall not give or offer gifts or gratuities of any type to Food Bank's employees or members of their families.

Upon execution of contract, the prospective contractor will need to attest that it:

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- a. Does not discriminate in the terms, conditions and privileges of employment, against any employee, or against any applicant for employment because of race, creed, color, sex, national origin, age, disability, sexual orientation or marital status;
- b. Has an affirmative duty to take prompt, effective, investigative and remedial action where it has actual or constructive notice of discrimination in the terms, conditions or privileges of employment against (including harassment of) any of its employees by any of its other employees, including managerial personnel, based on any of the factors listed above;
- c. Shall comply with all applicable federal, State and local civil rights and human rights laws with reference to equal employment opportunities and the provision of services.