Children's Friend and Service
Request for Proposal

Section I: Introduction

Children's Friend is Rhode Island's first child-serving nonprofit agency, providing services for children and families in need for 184 years.

Founded in 1834 in Providence, the agency started as a home for abused children and has evolved into one of the state's most innovative human service agencies. Guided by its mission, Children's Friend is the innovative leader in improving the well-being and healthy development of Rhode Island's most vulnerable young children. By reaching children in their earliest years and by working with the entire family, Children's Friend helps children grow up in the best possible environment while assisting their families to become self-sufficient.

Children's Friend is seeking proposals from qualified Vendors to provide a Donor Management System for the agency. This document is a Request for Proposal (RFP) for these services and does not obligate Children's Friend to enter into any contracts in response to this RFP. Please, carefully examine the specifications, conditions, and limitations.

The following criteria must be provided along with the proposal:
- Company History and Organization
- Itemized Cost Proposal and Invoicing Terms
- Annual licensing and support fees for 5 years following implementation
- References – 3 at minimum

Children's Friend intends to select the vendor which is the most advantageous to the agency and reserves the right to reject any and all bids or amend the scope of the project.

Section II: Challenges

Children's Friend and Service has experienced consistent growth that has impacted the management and tracking of donor life cycles. Fundraising information, event tracking, cultivation management, constituent data, and donation information are spread across multiple systems, platforms, and spreadsheets. These practices have caused a strain in communication

across teams, data tracking and analysis efforts difficult to achieve, and heavy and inefficient administrative burdens. What's more, recent advances in online fundraising and event planning seem to promise opportunities for Children's Friend to rely on more streamlined platforms that can perform for multiple teams within the Philanthropy department, the overall goal being great return on investment for both fundraising and general constituent management, as well as a tool to support best practices in data management.

Section III: Project Objective and Schedule

With these challenges in mind, Children's Friend seeks a vendor with a donor data technology solution. The stated solution will serve us as the client in multifaceted ways, such as, but not limited to; donor gift recording, contact tracking, replacement of other one dimensional platforms, and ROI through automation of daily tasks and reporting to achieve less burden on staffing hours.

Project milestones are as follows:

- RFP Release: 2/18/22
- Advanced Needs-Based Meetings w/ Vendors: 2/18/22-3/4/22
  (This is for any vendor who needs a deeper dive to build out a demo to present with their proposal accurate to our needs.)
- Proposals Due: 3/11/22
- Vendor Presentations or Demos: *(week of)* 3/14/22
- Vendor Selected: 4/1/22
- Project Implementation: 4/11 – onward

Section IV: Submission of Proposals

Responses to the RFP must be received **no later than 5:00 PM EST on 3/11/2022.** Late submittals will be rejected. All proposals are to be sent to the address below:

Tiffany Estrada
Email to: testrada@cfsri.org

Any questions regarding this RFP should be addressed to the above individual via email by 2/25/2022. Any answers provided to questions will be provided in writing and made available to all known interested parties by 2/28/22.

Section V: Scope of Solution and Services

Product Functionality and Architecture: (Should include, but is not limited to)

1. Platform needs to support at least 20 users
2. Platform should have the capability to migrate all constituent data from Raiser's Edge v7, including, but not limited to:
   - Approximately 20,000 Constituents; with the ability to support up to 50,000 in the coming 5 years
   - Approximately 50,000 gift records

- All funds, appeals, and campaign coding
3. User training must be provided with a clear outline of continued user support included within terms of contract
4. Platform should be cloud-based and must support desktop, tablet, and mobile environments with a desktop-first design.
5. Platform should have open API and should be available in the application to enable integration with external sources of data
6. Must be able to integrate with WordPress and Authorize.net online gift processing and automate the recording of online giving, OR have a solution that can replicate our current online giving tools.
7. Web Tools and Forms must be able to be created and maintained by Children's Friend staff
8. System should follow responsive web design standards and should work in poor latency environments (including auto-save functionality in case of connection disruption).
9. User access should be able to be controlled by Database Administrator to allow for role-specific privacy levels
10. Wealth-mining software is required
11. Integration with Microsoft Outlook is required, to enable push from platform to email client or vice-versa, with note/contact logging plug-in option.
12. Platform should allow the ability for users to automate reporting and donor cultivation through scheduling of tasks and queries.
13. The platform must support the main user areas of the Philanthropy department at Children's Friend including:
    - Fundraising and Event Management
    - Donor Management
    - Gift Recording
    - Marketing and Communications
    - Grant writing and tracking
14. The platform should be able to help automate the gift acknowledgment process by automatically logging online donations and be able to run acknowledgment letters from daily batching
15. Must be able to upload acknowledgment letters into the system to use for gift processing.
16. Must also be able to upload supporting documents for various constituents or grantor accounts (ie Award letters)
17. Must be able to support the donor interaction cycle:
    - Adding/tracking donations
    - Managing donor info
    - Prospecting
    - Reporting
    - Querying

- Mail merge
- Online Fundraising Campaigns

Product Security and Privacy Standards:

1. Platform must meet HIPAA and FERPA compliance for the security of data and must have third-party checks for vulnerability issues (e.g. Penetration Testing)
2. The application must be Secure Socket Layer (SSL) enabled
3. System should provide scheduled database backups, backup retention, backup transaction logs and disaster recovery plan. Must maintain logs minimum of 90 days.
4. Vendor will provide architectural documentation and certifications to ensure the Children's Friend data is secured and kept confidential
5. If any sort of data breach should occur where Children's Friend data is compromised, Children's Friend will be notified within 24hrs of said breach, with the appropriate impact statement and remediation plan
6. Database Architecture should follow RDBMS Database Structure and have an industry-standard encryption scheme
7. Complete Database Schema documentation must be provided

Project Implementation and Migration:

1. Vendor will provide Implementation plan module/program wise, parallel or cut off
2. Vendor will provide a detailed plan on data migration including current and legacy database
3. Vendor will ensure all work is performed promptly and according to project timelines.
4. Vendor will make available an internal Project Manager to ensure approved project milestones are executed on time.
5. Vendor must provide training for staff on proper operational practices and procedures for the proposed solution, including physical materials, videos, presentations, tip-cards, etc. to enable ongoing training and support by CFS staff.
6. Proposed solution must provide direct database access (e.g. SQL query interface)
7. Vendor must provide ongoing technical support for the proposed solution with:
   - 99.9% uptime Service Level Agreement(SLA)
   - Issue escalation notification timelines must be provided

Section VI: References

Provide at least three (3) client references whose use is comparable in size, profile to Children's Friend; include the name, address, contact person, and contact number. Preference is towards clients of similar organizational size (400+ employees OR -20 Philanthropy users) and near the geographical area of CFS (i.e. Northeast)

Section VII: Confidentiality & Rejections

Confidentiality

All information presented in this RFP, including information subsequently disclosed by Children's Friend during the proposal process, shall be considered confidential and should not be released to outside parties. This document represents a request for proposal only and in no way should be construed as a contract or letter of intent.

Rejection of Proposal

Children's Friend reserves the right to accept or reject any and all proposals and to waive any minor discrepancies or technicalities in the proposal or specifications, which are required to complete this project, or when deemed to be in the best interest of CFS.