



REQUEST FOR INFORMATION (RFI):

Nonprofit Enterprise Data Management System

DATE OF ISSUE: April 1, 2021

DEADLINE: April 29, 2021 at 4:00 PM

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INTRODUCTION

This Request for Information (RFI) is an invitation to submit proposals for a Nonprofit Enterprise Data Management System (EDMS) for Family League of Baltimore. The intent is to obtain information leading to the selection of a Nonprofit Enterprise Data Management System that will best meet the data collection needs of Family League of Baltimore.

Respondents who are selected for further consideration will be requested to present and demonstrate their system.

Please submit 2 copies of your response to FundedPartnships@FamilyLeague.org. Responses received after April 29, 2021 4:00pm EST will not be considered.

FACILITY PROFILE

Family League of Baltimore, 2305 N. Charles St., Baltimore, MD 21218
<https://www.familyleague.org>

Family League of Baltimore (Family League) is a 501(c)(3) nonprofit organization and the designated Local Management Board for the City of Baltimore. Since 1991, it has worked collaboratively to support data-informed, community-driven solutions that align resources to dismantle the systemic barriers which limit the possibilities for children, families, and communities. Stewardship, performance, trust, respect, innovation, and equity are the core values that guide its work.

Family League currently has multiple, and often siloed, systems the organization uses to collect, analyze, and report data around internal operations and external supports. See Appendix A for a list of systems.

Background

Family League has nearly 50 employees and provides support to approximately 100 partners, most of which do not have their own data systems and need support from the organization to capture information about programming, participants, and outcomes that are needed to inform their work and report to funders. The data collection, performance measures, and reporting needs vary by program type, thereby resulting in the need for configurable tools for each. These current tools, primarily Excel trackers, are disparate and require labor to manipulate and use to inform programmatic and organizational decision-making. Siloed systems make wholistic reporting a challenge, increase workload, and foster redundant processes.

EDMS Project Goals and Expectations

Family League is seeking a highly configurable platform system that:

- meets the needs of the internal organization and its external partners,
- is a platform system that holistically synthesizes the collection of data across the organization by replacing and/or integrating systems that move the major work processes for Family League,
- includes the ability to import historical data from previous systems via their backend database or data exports,
- and is a system that eases the burden on external partners doing their due diligence adhering to funder compliance requirements.

Specific expectations of the system include:

- Can grow with Family League as new initiatives are spun up and old ones are retired
- Simplifies data collection and lessens the burden on the collectors (users) by directing workflow
- Empowers staff to build robust reporting, form, and dashboard solutions
- Collects, stores, and processes data so that it can be viewed from many levels and in many layers
- Cloud-based/SaaS
- Prioritizes Data Integrity
- Adheres to Data and Regulatory Compliance as applicable (FERPA, HIPAA, SOX, FISMA)
- Designed with security in mind
- Incorporates or provides the ability to incorporate the Results Based Accountability Framework
- Has configurable features to aid in customer-level configuration (Business user level; not requiring high-level developer support)
- Provides data import/export options that are flexible to facilitate data sharing with and between other entities
- Provides integrations at no additional cost
- Is cloud-based SaaS Platform - Fully Family League owned
- Has multi-tenant offering to support Programs having individual partner "sites" and logins.
- Offers modular features by business area to support data collection by business function
- Is workflow driven
- Has a structured and accessible database back-end
- Offers premium level maintenance and system support plan at reasonable cost

System Administration

It is fully expected that the system will be administered by the Business applications staff within the IT department and the system will be used across the organization's business areas to include the following:

- Executive Office
- People and Culture (Human Resources)
- Programs
- Advocacy/Policy
- Finance, Grants & Contracts
- Information Technology Systems
- Data & Evaluation
- Fund Development/Advancement
- External Relations

CRITERIA FOR EVALUATION OF RESPONSES

Family League of Baltimore will evaluate the responses to this RFI based on the vendor's ability to:

- Meet the functional and technical requirements and the goals described in this RFI as evidenced by the RFI response and demonstration of the software.
- Provide a cost-effective solution that meets the financial goals of Family League of Baltimore as evidenced by references.

- Provide timely program modifications and upgrades in response to changing industry needs, regulatory requirements, and advancing technology as evidenced by references.
- Demonstrate expertise and functionality as evidenced by client references.
- Provide a superior level of customer service and technical support, both pre-installation and post-installation to clients as evidenced by references.

VENDOR PROFILE

1. Identify the company name, address, city, state, zip code, telephone, and fax numbers.
2. Identify the name, title, address, phone and fax numbers, and e-mail address of the primary contact person for this project.
3. Provide a brief overview of your company including number of years in business, number of employees, nature of business, and description of clients.
4. Identify any parent corporation and/or subsidiaries, if appropriate.
5. Please tell us about your company's values and culture.
6. Does your company have a publicly documented Equity statement\policy?
7. Give a brief description of the evolution of the EDMS software. Including what market\industry it was originally built to serve. Describe any previous ownership, if appropriate.
8. How does your solution or platform create choice for nonprofits and competition for nonprofit software solutions?
9. List any industry awards/recognition that you have received, the awarding party, and the date received.
10. To what degree is your solution purpose-built to nonprofit business process needs vs. purely commercial software that requires customization or configuration for nonprofits?
11. Indicate the total number of installations in the last 3 years by the year of installation and the total number of current users for the proposed system.
12. How vested in nonprofits is the team that creates the solution, and does the executive and technical and executive leadership have first-hand experience meeting the needs of the greater nonprofit ecosystem?
13. Provide a summary of your company's short term and long-term goals and strategic vision.
14. Provide a list of three references similar in size and specialty mix to Family League of Baltimore. References should be clients who have had their system installed within the past 48 months. (Include name, contact, address, telephone, system(s) installed and date of installation)

TECHNICAL ENVIRONMENT

General

1. What technologies, including database management systems, have you used to build your solution?
2. How is your solution different than those offered by your competitors?
3. What is your company's philosophy and commitment to user experience?
4. Was your solution built to work on mobile devices? And does it use Responsive Design (is it future-friendly and will work on ANY browser or device (computer, tablet, smartphone), including devices and screen sizes that haven't even been invented yet)?

5. Is broadcast email functionality built into your solution or is this functionality provided by a third-party vendor?
6. Incorporates or provides the ability to incorporate the Results Based Accountability Framework?
 - Measurable Outcomes\Impact
 - Results, Indicators, Performance Measures
7. Does your solution have a consistent data structure that will allow you to conduct searches across your entire database and get your results within the system?
8. Describe or attach your API policies.

Software/Data

1. Describe the data retention methodology used by the proposed system.
2. List cost of license agreements, renewal, and upgrades.
3. How accessible is your data, and does their data platform align to the Nonprofit Common Data Model?
4. Describe the length of time a software version is supported.
5. Please describe your system's database reporting tools.
6. Describe the security system used by the proposed system.
7. Describe your proposed disaster recovery plan to safeguard source code and ensure that the proposed system is recoverable in the event of a disaster at the headquarters of your facility
8. Describe your proposed disaster recovery plan for Family League of Baltimore to ensure that our data is safe and secure in the event of a disaster.

SYSTEM IMPLEMENTATION AND TECHNICAL SUPPORT

1. Describe and attach your typical implementation plan, including timeframe.
2. Describe the experience and qualifications of your installation team.
3. What kind of client communication and implementation planning is done prior to the installation?
4. Describe the training provided. Include a training outline.
5. Where is your technical support center located?
6. What are the methods for contacting technical support?
7. What are your hours of operation for technical support?
8. Describe the ongoing system support provided by the vendor.
9. Are software upgrades provided as part of the software support contract?
10. Describe your software upgrade process.
11. Are their "hot fixes" or "updates" between versions?
12. How often are new versions released?
13. How are customer requests for enhancements and customizations handled?
14. Describe the recent history of system enhancements.
15. Describe the qualifications of your product development department.
16. What percentage of your total employees is responsible for product development?
17. Do you have a formal users' group?

SYSTEM PROPOSAL

Provide a system proposal that includes:

1. Detailed listing of hardware provided.
2. Detailed listing of software provided.

3. Description of training provided, including location and time commitment.
4. Description and cost of ongoing support.
5. Cost of proposed system; pricing schedule.

FUNCTIONAL REQUIREMENTS

Refer to the following Functional Requirements checklist. A response to each checklist item is required. Brief comments may be entered in the table. Elaborate on any items that differentiate you from other vendor. Assign one of the following Availability Codes to each item:

A – Feature is available and included

B – Feature is available but not included

D – Feature is currently under development (indicate anticipated date of availability)

N – Feature is not available

NONPROFIT ENTERPRISE DATA MANAGEMENT SYSTEM FUNCTIONAL REQUIREMENTS			
<p>A - Feature is available and installed.</p> <p>B - Feature is available but not yet installed.</p> <p>D - Feature is currently under development (Indicate anticipated date of availability).</p> <p>N - Feature is not available</p>			
	Functional Description	Feature Availability	Vendor Comments
A.	SYSTEM ARCHITECTURE AND MAINTENANCE		
A.1	Can your solution integrate with our core software? Natively or via API		
A.2	Provide a system that employs a centralized relational database.		
A.3	Do you have a Research and Development roadmap for this product?		
A.4	Will customer input figure into future updates and upgrades?		

A.5	Provide a scalable system that can be expanded easily as our facility grows.		
A.6	Provide an operational environment which will ensure the security and integrity of the system and all its data.		
A.7	Provide for redundant storage of all system data files.		
A.8	Provide clear policy about how that data is destroyed after customer relationship ends.		
A.9	How much training will our staff require on your product?		
A.10	What happens to data when it's deleted from the system?		
A.11	Provide clear policy about data storage including the geographic region their data will be stored and providing the customer the option to choose where their data is stored.		
A.12	Please describe any scheduled maintenance procedures.		
A.13	Adheres to Data and Regulatory Compliance as applicable (FERPA, HIPAA, SOX, FISMA)		
A.14	Dynamic Form creation		
A.15	Reporting Canned and Ad-hoc Export (xlsx, csv, pdf) Data Quality\Audit		
B.	SECURITY AND AUDITING		

B.1	Provide a multi-level security system to ensure the confidentiality of information and to control access to system functions and features.		
B.2	Restrict access to specific areas of the application based on system function to be performed.		
B.3	Has your security ever been compromised\breached?		
B.4	Is data encrypted in transit and at rest?		
B.5	Offers multi-factor authentication and Single Sign On?		
B.6	Utilize role-based security?		
B.7	Maintain an automated system log of user sign-on activity with reporting ability.		
B.8	Maintain an audit trail for system entries including user code, date, and time of each system transaction.		
B.9	Provide access to and publish external audits of the system(s) and data handling practices regularly and upon request.		
C.	DATA INTEGRITY		
C.1	Has duplicate data checking (upon entry and via data quality reporting)		
C.2	Uses dynamic address checking\validation		
C.3	Field level validation		
C.4	Ongoing monitoring of data (data quality & audit reports, etc.)		

QUESTION & ANSWER

All written questions and inquiries regarding this Request for Information should be submitted via email to fundedpartnerships@familyleague.org until April 9, 2021 at 5:00 PM. All responses to the questions received via email will be compiled and published on the website by April 7, 2021.

KEY DATES AND DEADLINES

KEY DATE	ACTIVITY
April 1, 2021	RFI posted
April 9, 2021	Question Submission deadline
April 14, 2021	Question & Answer posting
April 29, 2021	Responses to RFI due (by 4:00 pm)
May 3 – May 13, 2021	Vendor Scoring and Demonstrations

APPENDIX A

Data Silo or System	Function\Purpose	Type
FUNDINGtrack	Grants Management System	SaaS
Charm	Historical - Partner Data Collection	Proprietary
ETO Archive	Historical - Partner Data Collection	SaaS
Maxwell	Home Visiting Partner Data Collection	SaaS
Sharepoint	Team Documents, Data Exchange, Intranet	SaaS
Network Share	F (Team) & U (Personal) drives	On Premise
One Drive	Team & Personal Documents	SaaS
Google Docs	Team & Personal Documents	SaaS
Survey Monkey	Survey Data	SaaS
Mailchimp	External Communications Contacts	SaaS
Wordpress\Website	Family League Website	SaaS
Laptops	Hard Drives	On Premise
Zendesk	Help Desk System	SaaS
ScoresReporter	Weikart - Program Quality Assessment Tool	SaaS
Microsoft 365 Exchange	Email	SaaS
Active Directory	Directory Service of Organization Users & Computers	On Premise
ArcGIS	GIS Mapping Tool	SaaS
LearningStream	Professional Development Registration Management System	SaaS
Nutrition POS System	Nutrition Program Vendor Data Collection System	Proprietary
Minute Menu	Nutrition Program Partner Data Collection System	SaaS
Evaluations	Program Level Evaluations	On Premise
Vendor Management	Compliance Group	SaaS
Abila MIP	Financial Management System	SaaS
Smartsheet	Project & Work Management Tool	SaaS
Paychex	Payroll System	SaaS
DocuSign	Electronic Signature Tool	SaaS
Tableau	Data Visualization Tool	SaaS

LinkedIn Learning	Learning Management System	SaaS
Hootsuite	Social Media Marketing Tool	SaaS
Monster Insights	Website Analytics	SaaS
Google Analytics	Website Analytics	SaaS
Facebook Ads Manager	Social Media Campaign Data	SaaS
LinkedIn Campaign Manager	Social Media Campaign Data	SaaS
GoToMeeting	Professional Development Online Training\Meeting Tool	SaaS
Zoom	Professional Development Online Training\Meeting Tool	SaaS
Korn Ferry	Talent Management Framework	SaaS
Excel	In-House Developed Trackers	SaaS