Request for Proposals for CRM Platform Implementation and Consulting Services

Request Date: August 18, 2021 | Submission Deadline: September 8, 2021

I. COMPASS Youth Collaborative Overview

Mission: COMPASS Youth Collaborative connects with high-risk youth wherever they are in the City of Hartford. We engage them in relationships to provide supports and opportunities that help them become ready, willing and able to succeed in education, employment and life.

Vision: All youth in our community feel secure, live peacefully and have the opportunities to reach their full potential.

Values:

- Resilience – We are resilient, we guide our youth to build resiliency so they can overcome obstacles and reach their goals.
- Peacefulness – We promote practices that create peace in ourselves, in our youth and in our community.
- Relentless – We are relentless in helping our youth overcome challenges. We will not stop until our young people have the skills they need to thrive.
- Integrity – We demonstrate integrity by staying focused on our mission. We are transparent with stakeholders and are ethical in all our activities.
- Collaboration – We seek out and work with community partners to provide the best resources and opportunities for the young people we serve; we are strong partners with our youth and in our community.

Core Programming:

COMPASS Peacebuilders (PBs) work with high-risk and disconnected young people age 16 to 20 in the community. They use street-level violence interruption strategies to address the public health crisis of neighborhood violence.

Youth are referred to the program through the Hartford Police Department, Hartford Public Schools, Juvenile Probation, Adult Probation, community-based agencies, and through our street outreach efforts. The program teaches life skills and builds a positive, neighborhood-based coalition of young people.

Upon entering the program, participants are assigned a Peacebuilder who acts as a case manager. The initial focus of the Peacebuilder is to build a trusting relationship with the youth. Once trust is established, the Peacebuilder conducts a more in-depth assessment of the youth’s experiences. Together, the Peacebuilder and young person establish goals and develop an action plan intended to help the participant avoid risky behavior.
COMPASS Peacebuilders Crisis Response Team are violence interrupters. They work directly within the Hartford Community to help mitigate violence, de-escalate conflict, and build relationships with the hardest to reach youth.

**Components of the Crisis Response program include:**

- Targeted street outreach
- Presence at public events and parties with potential risk for violent incidents
- Establishing a presence in hot spots, to prevent violence from bubbling up
- Response to a crisis involving youth
- Targeted youth outreach, specifically for youth involved in violence and at risk for retaliation
- The Team works in collaboration with the Hartford Police Department, City of Hartford and other community partners to keep the community safe, and reduce risk to young people and the community at large.

**Programmatic Diagrams:**

These two diagrams are still subject to changes as the program design is finalized in the lead-up to launch. However, they provide important context for the long-term processes that COMPASS plans to track with this new system.

1. The *Participant Program Pathways* diagram shows how young people will be engaged, develop new skills, and build relationships as they progress through the Peacebuilder program. This is similar to the customer journey in a traditional for-profit sales cycle.
2. COMPASS has created a two *Theory of Change* maps for each of the Peacebuilder program pathways. Each diagram shows the intervention strategies (services) that youth will receive, the intermediate outcomes that participants should achieve, and the long-term outcomes that they should be able to sustain. All of which need to be tracked in the new system.

**II. Scope of Services Requested**

COMPASS is seeking vendors to assist with the design, development, and implementation of a Constituent Relationship Management (CRM) system. The CRM will build the capacity of COMPASS staff to track manage interactions and outcomes of the Peacebuilder program. As an administrative tool, the CRM will drive performance management and improvement. It will also be an essential component of COMPASS’s larger Enterprise Resource Planning (ERP) effort to build a centralized data warehouse (see the included diagram) that will improve operational efficiency, fundraising, and program sustainability.

A successful proposal will demonstrate a clear understanding of COMPASS’s needs and how the interoperability of a final product will benefit our long-term ERP goals. Specific emphasis should be placed on improving the quality and simplicity of data collection and outcome tracking. Your proposal should show how your team has experience working with nonprofit organizations. Details about system specs and expectations are included below.

COMPASS is seeking an experienced CRM developer to build out and assist with the design of either a Salesforce or Zoho platform for youth case management. We are also considering proposals from nonprofit business process consultants to partner with the platform developer.
Process consultants will work with COMPASS staff to understand, map, and document key processes used in the case management life cycle and translate that into features in the database.

III. Project Brief

Starting in September 2021, COMPASS will be launching a new program model. Historically, COMPASS has served young people through school-based and community-based programs that work with a broad range of ages. The new program will only serve people aged 16 to 20 and will require extensive, individualized case management to help youth transition away from high-risk behaviors and develop new life skills.

The new COMPASS CRM will be used to manage all aspects of the individual cases and program performance. Youth need to be tracked from intake to assessment to enrollment and then throughout the program. Peacebuilders need to enter data, as well as view and update their caseloads. Program managers need to view dosage, manage PB caseloads, and produce reports on youth milestones and outcomes. Administrative staff need to report to funders and other community partners how many youth are being served, how well they’re being served, and how those youth are better off than when they started.

COMPASS Peacebuilders are the organization’s front-line staff that are from the same neighborhoods and backgrounds as the youth with whom they work. The PBs meet young people wherever they are out in the community. Their interactions with youth can be short and on the fly or structured through programming like field trips or at the community center. PBs meet with youth in groups and one-on-one.

While a CRM is typically used for managing customer interactions, COMPASS will be using it to manage relationships between PBs and the youth that they serve. To translate the traditional CRM framework to COMPASS’s needs, consider that our sales team are Peacebuilders; Leads are youth referrals to the program (as identified by PBs and community partners); and Lead scoring is our youth intake process.

1. System Requirements
   a. COMPASS will require 20 to 50 users annually with various access tiers. The system will need to be accessible via mobile application and designed with flexibility and interoperability in mind.
   b. Essential System Requirements for Launch are:
      i. The ability for PBs to input demographic data about youth – independent of program enrollment - and conduct intake assessments that leverage a point system to determine if a youth is Pathway 1 or Pathway 2.
      ii. The ability for PBs to pull up individual youth profiles and see program dosages and specific services being received and enter case notes
      iii. The ability for program managers to setup and change PB caseloads
      iv. Referral forms for externally facing community partners need to go to appropriate stakeholders
   v. Mobile Integration
      • Peacebuilders are active at all hours of the day/night and are rarely sitting in front of a computer. CRM features, like forms and profile pages, intended for use by Peacebuilders need to be designed with mobile access from an iPhone in mind.
vi. Normalized ER diagrams need to be created and used as foundation for the entire system
vii. Basic reporting features for launch should include at least:
  ▪ Aggregate youth interactions (dosages) on a weekly basis for Peacebuilder performance
  ▪ A per-youth report showing pathway progression, aggregate dosages by type (in-person and remote), and percent completion status of intake with number of days since intake began
  ▪ A program dashboard showing counts of youth in each pathway, number of incomplete intakes, per Peacebuilder-Youth interactions by type, and number of youth by stage of change over time

c. Post-launch System Requirements
  i. Seamless integration with a third-party analytics platform
  ii. Integration with existing systems
  iii. Ability to maintain offline system backups
  iv. Ability to write custom queries
  v. Communication tracking
    ▪ PBs communicate via SMS, phone, and email with youth and interactions need to be tracked

d. Security and Backups
  i. COMPASS serves young people aged 16 to 20. For all participants, data regarding education enrollment and judicial involvement will be tracked and must be kept secure and backed up offline. For 16 and 17 year old youth, education and juvenile justice data are sensitive and will require specific protections and limited access.

2. Constituents & Entities
   a. While this list is not comprehensive, it covers most of the data that COMPASS will need to track to reach Minimum Viable Product (MVP) as referenced in the project timeline.
   b. Youth
      i. Basic demographics (including searchable nicknames) and onboarding data
      ii. Progression through program pathways (see included diagram)
         ▪ Youth will be automatically sorted into pathways upon intake
         ▪ Will require tracking different outcomes depending on program pathway
         ▪ Outcomes will likely include progress toward behavioral milestones, as well as education/certification attainment and sustained employment for at least 12 months after program completion
         ▪ Changes in behavior, like reduction in violence or arrest/justice involvement are also tracked
      iii. Cohort tracking
      iv. Case notes
      v. Service plans
      vi. Youth assessments on intake, readiness, and safety
   c. Parents/Households
      i. Permission, involvement, own criminal history
      ii. Within household relationships (parents, siblings, other)
   d. Peacebuilders
i. Input onboarding data about youth  
ii. Submit case notes to track youth interactions  
iii. Caseload and dosage management via youth profiles  
iv. Track outreach to youth on the fly  
v. Track staff training credentials  

e. Community partners  
   i. Education or engagement partners that train and connect youth to COMPASS  

f. Employers  
   i. Where youth are employed  
   ii. Relationship management with employers  

g. Service locations  
   i. Where youth are receiving services  

h. Events  
   i. Field trips, community gatherings, education/job training, etc.  

3. User Groups  
   a. Access will be managed based on needs and may require different system views  
   b. COMPASS Administrative Staff  
   c. Program Managers  
      i. Need to see reports about Peacebuilder performance  
      ii. Monitor program outcomes for youth  
   d. Other Program Staff (not yet hired)  
      i. Education and job training staff  
      ii. Licensed Clinical Social Workers  
   e. Peacebuilders  
      i. Will primarily access the system via mobile devices  
   f. Parent/Youth (potentially)  
   g. Funders/Community Partners (potentially)  
      i. Externally facing reports accessible through a secure portal  

4. Existing Systems  
   a. Efforts to Outcomes (ETO) legacy system  
      i. ETO is a CRM tool widely used by nonprofits that provide direct services to youth and families. However, it is a closed system without broad customizability or integration with other platforms. The system COMPASS uses is owned by the City of Hartford, further complicating our ability to use it. However, all data will be exported prior to beginning the build of a new system. Records for approximately 1,500 to 2,000 youth that have been served over at least 10 years are currently in ETO. There are also about 25,000 to 30,000 case notes on interactions with those youth in the database.  
   b. Flat files in Excel  
      i. A broad array of program data exists or is processed and analyzed in Excel.  
   c. Gravity Forms (GF)  
      i. GF is currently being used as a bridge to data collection. During the design and build phases of this project, all data will be collected using standardized forms that will ensure high quality, consistent data. COMPASS is using an Elite license.
ii. This data collection tool will act as a bridge while the new platform is being built
d. Zapier
i. Zapier is a process automation tool that allows data to efficiently move across systems. COMPASS has a paid ‘Professional’ level license.

5. Documentation requirements
a. Process Maps
b. ER Diagrams
c. Training Materials

IV. Project Roles

1. COMPASS Youth Collaborative Data Team:
a. Responsibilities:
   i. Serve as project manager
   ii. Create and manage documentation, where needed
   iii. Convert mapped processes into features and automated reports
   iv. Provide data in a timely manner
b. Lead Staff
   i. Director of Data & Digital Systems – Christopher Brechlin
   ii. Data Analyst Intern – Kimberly Okeke

2. COMPASS Program Staff
a. These are the primary users of the CRM and will be consulted regularly and trained in how to use the system. Staff range from Peacebuilders on the front-lines to program managers and executive leadership.
   i. Vice President of Operations – Julia Corrigan
   ii. Director of Crisis Response – Dean Jones
   iii. Program Coordinator – Natalie Azuaga

3. CRM Consultant:
a. Conduct initial review to clarify project requirements and timeline
b. Convert design specifications into a functional set of database tables and populate the system with data
c. Provide documentation of work
d. Ensure that all necessary features are available in final product
e. (If applicable) Communicate and coordinate with the process consultant for design, implementation, and training

4. Process Consultant:
a. Work with CRM vendor to coordinate documentation of COMPASS’s organizational needs and convert them into functionality in the new system
b. Collect data from program staff to document essential processes within the Peacebuilder program
c. As the new system is rolled out to staff, conduct trainings and provide assistance to staff in using the new system
d. Potentially serve as a backup project manager in coordination with the Director of Data & Digital Systems
e. Solicit feedback at determined intervals for continuous improvement throughout the CRM implementation phases.

V. Project Timeline

COMPASS is using a lean approach to reach CRM implementation as quickly as possible. This means that COMPASS expects the vendors to reach a minimum viable product (MVP) as quickly as possible. The MVP will need to facilitate data collection and produce basic reports for program management and improvement. There will be frequent and continuous changes happening in the first six months of implementation and consultants should budget time for this.

1. Vendor Selection and Project Start
   a. Successful proposals will be selected within two weeks of the submission deadline
   b. The design phase is expected to being within two weeks of vendor selection
      i. Process consultants will begin work within the first three weeks of the design phase

2. CRM Design
   a. Consultants will help create an initial Entity Relationship (ER) diagram or schema that maps out how data will be organized in the CRM.
   b. Estimated time: 4 to 6 weeks from project start date

3. Minimum Viable Product (MVP)
   a. Consultants will have the CRM infrastructure built enough so that standardized data collection can begin, but there will be minimal reporting features.
   b. Estimated time: 8 to 12 weeks from project start date

4. Process Mapping
   a. Consultants will work with COMPASS program staff to document business processes to build reports and automate tasks.
   b. Estimated time: 8 to 12 weeks from project start date, then ad hoc support

5. Fully Featured CRM
   a. All constituents, entities, and automation identified during the Design and Mapping phases are live
   b. Estimated time: 12 to 20 weeks from project start date

6. Analytics and Reporting
   a. Consultants will work with COMPASS data staff to build dashboards and reports in the CRM according to the design process maps.
   b. Estimated time: 24 to 32 weeks from project start date

VI. Proposal Evaluation Criteria

1. Technical Proposal = 50 points
   a. 15 points for understanding of the functionality that COMPASS will need, relative to the features available through an off-the-shelf CRM platform.
   b. 10 points for demonstrated understanding of the nonprofit-client process flow. A special emphasis should be on how to address challenges associated with designing a system specifically for COMPASS Peacebuilders, as well as the use of specific techniques.
   c. 10 points for a training plan that is flexible and includes in-person and remote sessions.
d. 10 points for accessible and clear methods of documentation, including ER diagrams and swim-lane diagrams.
e. 5 points for a clear and realistic implementation timeline.

2. Cost Proposal = 20 points
   a. Pricing structure is clearly documented, reasonable, and competitive.
   b. A minimum cost is provided with an additional hourly cost.
   c. Does the proposed cost include the first year of licensing? What are the ongoing annual costs for licensing?
   d. If a larger budget than the amounts listed below is proposed, details should be provided.
   e. Project Budget:
      i. Up to $150,000 is available for proposals submitted by developers inclusive of design, development, implementation and nonprofit-specific process consulting.
      ii. Up to $100,000 is available for proposals submitted without nonprofit-specific process consulting.
      iii. Up to $50,000 is available for proposals by experienced nonprofit process consultants, with the intention of a long-term engagement over 12 to 18 months.

3. Experience/Qualifications = 15 points
   a. Vendor should have experience building relational databases for nonprofits and demonstrate experience implementing a mobile app along with it.
   b. Process consultants should be able to show a body of work assisting nonprofits with technical, systems-based projects.

4. Goodness of fit/references = 15 points

VII. Proposal Format and Submission Requirements

Individuals or firms responding to this RFP should provide a concise but appropriately detailed response addressing the following:

1. Executive Summary and Description of Organization. Please briefly describe your organization and its experience delivering these services, including how you are uniquely qualified to deliver on the scope of services described in this RFP. Include a value proposition that justifies cost relative to other products or services on the market. Explain how your services will compliment COMPASS’s existing capacity.

2. Technical Approach. Please provide a Statement of Work that describes how you would approach this project and deliver on the scope of services described in this RFP. Where appropriate, we encourage you to include schematics and diagrams that provide both conceptual and technical descriptions of the proposed solutions.
   a. The approach should address, at a minimum, the following:
      i. Overall approach to customized CRM implementation projects.
      ii. Overall approach to CRM implementation projects leveraging proprietary tools or methods.
      iii. Proposed system development methodology.
      iv. Approach for integrating with existing external systems.
      v. Approach for migrating data in a cloud-based environment.
      vi. Approach to training and deployment.
3. **Experience and References.** Describe your qualifications and prior experience implementing customized Salesforce solutions. Identify and describe at least three completed Salesforce projects most related to this one and provide, at a minimum, information regarding:
   a. Type of CRM implementation.
   b. Project start and end dates.
   c. Parameters indicating project size and complexity (e.g., number of end-users and locations, duration).
   d. Similarities to this project scope.
   e. Duration of any ongoing support or training relationships after initial deployment.
   f. Integration requirements with external systems.
   g. Type of client (e.g., government, non-profit, private) and industry sector.
   h. Client contact information

4. **Staffing Plan and Team Profile.** Provide a proposed staffing plan that includes:
   a. Overall staffing approach to cover all facets of the project.
   b. Project organization chart, including name and title where known.
   c. Role description for each specified role, inclusive of job duties, special experience, skills, and/or certifications, and expected weekly time commitment to the project.
   d. List of any proposed subcontractors and a description of the specific need for the expertise and the arrangements for achieving subcontracting.

5. **Pricing Structure and Budget.** Please propose a detailed budget, including an explanation of your pricing structure, aligned to the scope of services described in this RFP.

**Please Submit Proposals to Christopher Brechlin by September 8, 2021. Feel free to schedule a brief video conference, if needed.**
COMPASS Youth Collaborative
Theory of Change

Moderate Pathway (1)

Providing this...

Group Facilitation Cognitive Behavioral Skills
- Workshops: Education, life skills, career readiness.

- 1-to-1 Case Management
- Relationship Building
- Assess Needs
- Basic Needs
- Cognitive Behavioral Skills

Job Training: Career certifications
Academic Support

Monthly home, court, school, and community visits

Referrals for specialized services

Monitor and evaluate

Crisis Response

...leads to youth achieving this...

Reduced engagement in violence for 6 months

Reduced justice involvement

Improved emotional regulation

Graduate HS or GED attainment

Post secondary degree / certification enrollment

In pathway to stable employment through referral opportunities to social enterprises (OPP)

...which culminates in...

Youth:
- Persists in post secondary/Certification program for 6 Months
- Persists in referral program for 6 months

Intermediate Outcomes

Upon Graduation

- 1- to 1 Case Management
- Relationship Building
- Assess Needs
- Basic Needs
- Cognitive Behavioral Skills

Long Term Outcome

At end of 1 year
COMPASS Youth Collaborative
Theory of Change

Severe Pathway (2)

Providing this...
- Monthly home, court, school, and community visits
- Monitor and evaluate
- Referrals for specialized services
- Crisis Response
- Group Facilitation Cognitive Behavioral Skills
  - Workshops: Education, life skills, career readiness.
  - 1-to-1 Case Management
  - Relationship Building
  - Assess Needs
  - Basic Needs
  - Cognitive Behavioral Skills
- Job Training: Career certifications
- Academic Support
- Monthly home, court, school, and community visits
- Job placement to non subsidized employment
- Job placement to non subsidized employment through internal employment program training for 6 months
- - Stable employment through internal employment program training for 6 months
- - Assessed Needs
- - Basic Needs
- - Cognitive Behavioral Skills
- - 1-to-1 Case Management
- - Relationship Building
- - Assess Needs
- - Basic Needs
- - Cognitive Behavioral Skills

...leads to youth achieving this...
- Reduced engagement in violence for 6 months
- Reduced justice involvement
- Improved emotional regulation

...which culminates in...
- Youth:
  - Reduction in violence
  - Reduction in Justice System involvement for 6 months
  - Persists in stable employment through non subsidized employment for 6 months

Intervention Strategies (dosage and duration)
Please refer to our active slot for dosage

Intermediate Outcomes
Upon Graduation

Long Term Outcome
At end of 1 year

Compass Youth Collaborative connects with Hartford’s highest risk youth wherever they are in the City of Hartford. We engage them in relationships to provide supports and opportunities that help them become ready, willing, and able to succeed in school and/or work.
**Participant Program Pathways:**

**AFTER FIRST 60 DAYS**
- Youth is safe.

**SEVERELY DISCONNECTED (PATHWAY 2)**
- Youth is prepared to engage in Peacebuilders program.

**MODERATELY DISCONNECTED (PATHWAY 1)**
- Youth is prepared to engage in Peacebuilders program.

**2-12 MONTHS FROM ENROLLMENT**
- Show anti-violent intent.
- Build resilience to anti-social relationships.

**6-18 MONTHS FROM ENROLLMENT**
- Show anti-violent intent.
- Build resilience to anti-social relationships.

**12-24 MONTHS FROM ENROLLMENT**
- Demonstrate conflict management skills.
- Demonstrate education and work self-efficacy.

**18-36 MONTHS FROM ENROLLMENT**
- Demonstrate conflict management skills.
- Demonstrate education and work self-efficacy.

**36-48 MONTHS FROM ENROLLMENT**
- Attending COMPASS work program.
- Demonstrating work readiness.
- Having pro-social relationships outside of COMPASS.

**POST PROGRAM COMPLETION**
- Stable employment through non subsidized employment for 6 months.
- Make Healthier Choices/ Self Regulating.
- No recidivism, engagement in violence for 6.
- Persistence in post secondary / certification program for 6 months.

**Youth is prepared to engage in Peacebuilders program.**

**Demonstrate education and work self-efficacy.**

**Attending school/work readiness program consistently.**

**Having pro-social relationships outside of COMPASS.**

**COMPASS YOUTH collaborative**
Data Warehouse

- Development
  - DonorPerfect
  - Partnerships
- Analytics
  - Internal
  - External
- PeaceBuilders CRM
- Finance & Admin
  - Quickbooks
  - Insperity
  - Fleet Tracking
- IT
  - Users
  - Devices
- Website
- Constant Contact

Systems Planning & Data Flows