PARTNER4WORK
The Workforce Development Board for the Pittsburgh Area

Requirements Checklist

ID	Category	Subcategory	Priority	System Requirement	Y/N/M1/M2/M3	Vendor Notes
1	General Application Requirements	User Access	Required	Users can access the system twenty-four hours a day, seven days a week, from any location.		
2	General Application Requirements	User Access	Required	Acceptable system responsiveness, including fast page loads and response time. Please describe.		
3	General Application Requirements	User Access	Required	Staff can access system from PC or Mac. Preferably, without having to connect through a third party to access the system (e.g. Citrix). Please elaborate on system access.		
4	General Application Requirements	User Access	Required	System should perform automatic backups while allowing users to stay logged in.		
5	General Application Requirements	User Access	Required	System provides mobile access with mobile responsive design. Mobile may be a streamlined version. Please describe any limitations to mobile version.		
6	General Application Requirements	Personalization	Required	Users need to be able to choose what information displays on their home screens, so that each individual sees items most relevant to their responsibilities.		
7	General Application Requirements	Personalization	Nice to Have	Users should be able to set and store bookmarks to specific records, functions, or reports to facilitate quick access to frequently used content.		
8	General Application Requirements	Personalization	Nice to Have	Administrators should have the ability to hide or enable system areas or record areas for specific user groups in order to create a streamlined user experience by organization role.		
9	General Application Requirements	Design and Navigation	Required	System has a layout that is readable, organized, and easy to navigate. It should be intuitive to the user, particularly for new users.		
10	General Application Requirements	Design and Navigation	Required	Key constituent information, such as contact details and constituent type/primary segment codes, must be readily viewable.		
11	General Application Requirements	Design and Navigation	Required	Users should be able to enter data for a specific record type (e.g. constituent, event, interaction etc.) easily from one screen.		
12	General Application Requirements	Design and Navigation	Required	Data entry should require minimal keystrokes, and the system should offer keyboard shortcuts and defaults to speed data entry.		
13	General Application Requirements	Design and Navigation	Required	When data appears in multiple rows in a table format (e.g. data list), the user should be able to sort and filter the data by column.		
14	General Application Requirements	Design and Navigation	Required	System must be capable of operating in a multi-user environment with record-locking techniques that protect records from simultaneous update, yet allow simultaneous inquiry.		
15	General Application Requirements	Search Functionality	Required	System should allow staff to search by different record types. (e.g. Individual, organization, partner, employer).		
16	General Application Requirements	Search Functionality	Required	Users can utilize advanced search functionality (e.g. "wild card" and/or partial string search options). Allows user to select if they want near match or exact match search results returned. Examples: Name, Address, E-mail, Phone Number, Constituent ID. Search should operate similar to a "Google" type search, returning similar matches from multiple record types (organizational, relationship, constituent, etc.).		
17	General Application Requirements	Search Functionality	Required	System should allow staff to execute constituent searches using a combination of fields including name, alias/nickname, previous names (e.g. maiden name) constituent ID, address, email, or phone number.		
18	General Application Requirements	Search Functionality	Required	System should allow staff to execute constituent searches using events, projects or program fields.		
19	General Application Requirements	Search Functionality	Required	System should allow search by constituent category, as defined by Partner4Work.		
20	General Application Requirements	Business Rules and Workflows	Nice to Have	Users should be able to set triggers so that processes occur automatically or the system alerts staff to consider updating additional related data.		
21	General Application Requirements	Business Rules and Workflows	Required	System should automatically tag records based on user defined triggers.		
22	General Application Requirements	Business Rules and Workflows	Required	System should allow for conditional content on all standard fields based on business need.		
23	General Application Requirements	Business Rules and Workflows	Nice to Have	System should provide opportunities to automate data maintenance and coding updates using conditional criteria and programmed workflows.		
24	General Application Requirements	Business Rules and Workflows	Required	System should support workflows, which guide users through the steps of a process. Workflows should not allow staff to move to the next step in a workflow unless the current step first meets its defined criteria for completion. Workflows should notify users when one task in a workflow is complete and ready for the next action step. Please describe any limitations.		
25	General Application Requirements	Imports and Exports	Required	System should allow staff to import and export data into and out of the system in multiple file formats (e.g. .csv, .txt, Excel, PDF).		
26	General Application Requirements	Imports and Exports	Required	System should have the ability to rename columns in import/export files.		
27	General Application Requirements	Imports and Exports	Required	System must be able to import new constituents and append data to existing records.		
28	General Application Requirements	Imports and Exports	Nice to Have	Users should be able to upload contacts through integration with email, digital address books (e.g. google contacts), or digital apps that organize business cards.		
29	General Application Requirements	Imports and Exports	Required	System should provide a robust constituent matching function to identify potential duplicates by user-defined data criteria (e.g. name, address, email, phone).		
30	General Application Requirements	Queries and Lists	Required	System provides a user-friendly query tool that allows them to retrieve specific data from any table within the database.		
31	General Application Requirements	Queries and Lists	Required	All fields in the database must be accessible as query criteria and outputs.		
32	General Application Requirements	Queries and Lists	Required	Query tool should not require special programming knowledge, but should have common operators for creating query logic (e.g. greater than, less than, equal to, contains, null/not null, begins with, etc.).		
33	General Application Requirements	Queries and Lists	Required	Querying a certain field returns all results, not just most current value (e.g. a query for email returns ALL active email addresses).		
34	General Application Requirements	Queries and Lists	Nice to Have	Querying a certain field gives the ability to choose how results are displayed.		
35	General Application Requirements	Queries and Lists	Required	System should save queries for future use and be able to merge several pre-existing queries and/or query results.		
36	General Application Requirements	Queries and Lists	Required	Query output should include fields that are not in the query selection criteria.		
37	General Application Requirements	Queries and Lists	Nice to Have	Users should be able to add records manually to a query selection, one at a time or by importing record IDs or combining other lists.		
38	Database Administration	Audit Trail and History	Required	System should retain all historic data with no date limitations. Any deletion or removal of system data should be client directed. Please describe any limitations.		
39	Database Administration	Audit Trail and History	Required	System should create an audit trail of changes to the database.		
40	Database Administration	Audit Trail and History	Required	The audit trail should include the before and after values for all changed fields, the date of the change, the user who made the change, and the data source. The trail must preserve changes for several years at a minimum, but ideally in perpetuity.		
41	Database Administration	Audit Trail and History	Required	System should be able to produce a report of all changes made to the database based on date range. The report should allow filtering by system user and summarization by change or record type.		
42	Database Administration	Audit Trail and History	Required	Users should have the ability to export data or establish integration workflows utilizing date last changed criteria.		
43	Database Administration	Audit Trail and History	Required	Date last changed should apply to all fields.		
44	Database Administration	Audit Trail and History	Nice to Have	System provides ability to archive and easily restore archived records.		
45	Database Administration	Hosting, Performance and Environments	Required	P4W prefers a software as a service (SaaS) solution or a cloud-hosted system where the vendor is responsible for server management.		
46	Database Administration	Hosting, Performance and Environments	Required	The system should perform daily backups, and if an outage were to occur, P4W would expect all data to be recovered. Downtime, if necessary, must be limited to off-hours only.		
47	Database Administration	Hosting, Performance and Environments	Required	System should be able to maintain multiple environments and push data and functionality to those environments for the purpose of production, development, testing and training.		
48	Database Administration	Security	Required	System should set security permissions by user group or role., including external users.		
49	Database Administration	Security	Required	Based on permissions, the system should limit view, add, edit, and delete functions for users.		
50	Database Administration	Security	Nice to Have	Administrators should have the ability to "impersonate" other users in the system to troubleshoot problems with access and permissions.		
51	Database Administration	Security	Required	System should also set security for reports and documents.		
52	Database Administration	Security	Required	System should support multi-factor authentication for staff accessing the system.		
53	Database Administration	Security	Nice to Have	System should support Single Sign-On.		
54	Database Administration	System Configuration	Nice to Have	Users need to set field values, requirements, and alerts through a configuration module. Ideally, the system will allow administrators to configure the field layout of specific data screens in order to customize the interface in a way that prioritizes data points that are critical to P4W and hides or minimizes others that are not.		
55	Database Administration	System Configuration	Required	System will prevent users from saving records without completed required fields.		
56	Database Administration	System Configuration	Required	System should allow designated staff to create custom alerts or notifications that display when specified constituent records are opened.		
57	Database Administration	System Configuration	Required	System should allow authorized staff to create custom fields and tables. These staff should be able to specify a format and enter user-defined lists for custom drop-down tables. The system should allow these staff to create a hierarchy of tables based on specific screens/areas.		
58	Database Administration	Duplicate Management	Required	System should support use of user-defined criteria for duplicate checking. Record matching should include options to match to various system fields.		
59	Database Administration	Duplicate Management	Required	System should notify a user before adding a potential duplicate to the database.		
60	Database Administration	Duplicate Management	Required	Users need to be able to identify and merge duplicate constituents individually or in bulk and reverse merges as needed.		
61	Database Administration	Data Maintenance	Required	System should allow P4W to set standardized formatting rules and auto-formats upon data entry. It needs to alert staff with an error message when a formatting requirement is unmet (e.g. a user enters an email without an @ sign).		
62	Database Administration	Data Maintenance	Required	System must update records through National Change of Address (NCOA) screening or other address updating services.		
63	Database Administration	Data Maintenance	Nice to Have	System should provide tools for staff to perform ongoing data maintenance. Ideally, the system would prompt users to consider editing specific data based on user-defined triggers (e.g. user updates employment job title, system prompts to consider change of business address).		
64	Database Administration	Data Maintenance	Required	Users need to be able to make changes to constituent records globally in bulk.		
65	Database Administration	Vendor Support	Nice to Have	P4W prefers a vendor with experience in the workforce development sector.		
66	Database Administration	Vendor Support	Required	Vendor support must be consistent and reliable.		
67	Database Administration	Vendor Support	Required	Vendor should maintain a history of reported problems and fixes accessible to system administration staff.		
68	Database Administration	Vendor Support	Required	Vendor should have the ability to review and remedy issues remotely.		
69	Database Administration	Vendor Support	Required	Users must have direct phone support and/or live chat available during P4W operational hours.		
70	Database Administration	Vendor Support	Required	Issues that are elevated to a ticketing system should have a minimum initial response time.		
71	Database Administration	Vendor Support	Required	Vendor should provide documentation for end users and an online resource center.		
72	Database Administration	Vendor Support	Required	Vendor should have a commitment to regular upgrades and good communication with clients regarding fixes, patches, and updates.		
73	Database Administration	Vendor Support	Required	Training options for the system should include online and optional on-site sessions.		
74	Database Administration	Vendor Support	Nice to Have	Training should include curriculum pathways that focus learning around end-user, system administration, reporting and business intelligence training needs.		
75	Integrations	Website	Required	System should integrate with P4W's website.		
76	Integrations	Website	Required	System should offer online forms that have the ability to connect to the CRM, adding data to constituent records. Please describe specifics and limitations.		
77	Integrations	Email Communication	Required	System must provide native email functionality or integrate with a third party, email marketing automation tool.		
78	Integrations	Email Communication	Nice to Have	P4W would like the system to connect to organizational email platforms for coordinated calendar and contact management functions. Currently, P4W is using Gmail but the organization is migrating to Microsoft.		
79	Integrations	Provider Communication	Nice to Have	Please discuss existing integrations with Basecamp, or similar platforms.		
80	Integrations	Legislative Tracking	Nice to Have	Please discuss any native legislative tracking functionality, or existing integrations to legislative tracking platforms, such as Quorum.		
81	Integrations	Project Management	Nice to Have	Please discuss existing integrations with Asana, or similar platforms.		
82	Constituent Management	Biographic Management	Required	System should maintain central constituent accounts, storing multiple addresses, phone numbers, and email addresses.		
83	Constituent Management	Biographic Management	Required	System should store preferred names, aliases, titles, suffixes and maiden names.		
84	Constituent Management	Biographic Management	Required	System should store information for different record types including individuals, groups, and organizations.		
85	Constituent Management	Biographic Management	Required	System should store multiple addresses and phone numbers for organizations with multiple offices or branches.		
86	Constituent Management	Biographic Management	Required	System should save full organizational names, as well as abbreviated versions and acronyms.		
87	Constituent Management	Biographic Management	Required	System should store demographic information for the constituent, such as ethnicity, age, education level, profession, and gender. Please describe the ability to add or edit demographic fields.		

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88	Constituent Management	Biographic Management	Required	System should include options for pronoun preferences and not restrict records to traditional male/female gender roles.		
89	Constituent Management	Biographic Management	Required	System should support utilizing non-Western name characters including accents, most commonly.		
90	Constituent Management	Biographic Management	Required	Users must be able to mark constituents as active or inactive including date ranges.		
91	Constituent Management	Biographic Management	Required	System should store alternate system IDs to assist with data imports and integration.		
92	Constituent Management	Biographic Management	Required	Users with appropriate permission should have ability to edit, re-assign or remove constituent ID numbers.		
93	Constituent Management	Biographic Management	Required	Administrative users should have the ability to remove alternate IDs.		
94	Constituent Management	Constituent Types	Required	The system must have the ability to manage multiple constituent types, such as current and future funding sources (e.g. foundations, corporations), program providers, program participants, area employers, workforce development influencers, community partners, individuals, and policy makers.		
95	Constituent Management	Constituent Types	Required	The system must support a hierarchy of contacts within constituent records, such as providers, employers, foundations, board members and grantmaking organizations.		
96	Constituent Management	Name Formats	Required	System should have options for storing, automating, and customizing constituent addressees and salutations.		
97	Constituent Management	Name Formats	Required	Users need to be able to set default combinations of titles, names, and suffixes and to assign a name format type (e.g. formal singular, formal joint, informal singular, informal joint).		
98	Constituent Management	Name Formats	Required	System should automatically create default addresses and salutations that staff can override, and it should prevent system updates to the customized addressees and salutations.		
99	Constituent Management	Name Formats	Required	System should also support custom name formats used for recognition or distinct communication purposes.		
100	Constituent Management	Name Formats	Required	Custom formats should have unique type codes that are user defined.		
101	Constituent Management	Relationships	Required	Users should be able to create relationship links between constituent records in the system.		
102	Constituent Management	Relationships	Required	All relationships must be qualified by a type describing the nature of the relationship (e.g. partner organization, employer, etc.).		
103	Constituent Management	Relationships	Required	The system must allow relationships to be tracked by one or more types.		
104	Constituent Management	Relationships	Required	The system should permit user-defined relationship types.		
105	Constituent Management	Relationships	Required	System should save start and end dates on relationships.		
106	Constituent Management	Relationships	Required	P4W would like to capture an individual's employment information, and the individual should be linked to their employer's organization record.		
107	Constituent Management	Relationships	Required	System should allow staff to link individual contacts to organizations and assign contact types (e.g. primary contact, executive contact, grant contact).		
108	Constituent Management	Relationships	Required	For organizational records, the system must store multiple contacts, with the name, job title, role or contact type, and contact information for each individual contact.		
109	Constituent Management	Relationships	Required	The system must allow stakeholders (including individuals, foundations, organizations) to be linked to specific events, programs, projects, or committees.		
110	Constituent Management	Notes	Required	Users should have the ability to add free form notes and comments to records as well as link documents to constituent record.		
111	Constituent Management	Notes	Required	Notes captured within the system should be searchable and include options to capture date and source of the information. There should not be character limits on the fields.		
112	Constituent Management	Contact Information and Preferences	Required	System should store multiple addresses, phone numbers, and email addresses for constituent records.		
113	Constituent Management	Contact Information and Preferences	Required	System should allow staff to define the contact information by type and specify one as preferred.		
114	Constituent Management	Contact Information and Preferences	Required	Users should be able to flag specific addresses or numbers as "do not mail" or "do not call." Additionally, the system must allow flagging for "bounced" and "no longer in service."		
115	Constituent Management	Contact Information and Preferences	Required	The system must allow stakeholders to opt out of communications by frequency and type.		
116	Constituent Management	Contact Information and Preferences	Required	System should include integrated options for validating, enriching and auto formatting/standardizing addresses.		
117	Constituent Management	Affiliations	Required	System should track professional and community affiliations.		
118	Constituent Management	Affiliations	Required	Affiliation selections should be tied to a standardized list of options, making them easily searchable or available as list criteria.		
119	Constituent Management	Interests	Required	System needs a robust and flexible coding system(s) to capture and manage interests.		
120	Constituent Management	Interests	Required	System should enable designated users to import and apply codes to records in bulk fashion (or via automated processes).		
121	Constituent Management	Interests	Required	Activity and interest codes must be available to apply as criteria in list creation.		
122	Constituent Management	Constituent Classification and Coding	Required	System should allow P4W to classify its constituents according to multiple diverse needs.		
123	Constituent Management	Constituent Classification and Coding	Required	System should not allow users to overwrite origin/source code equivalents. Users with administrative rights can overwrite codes, but other users should not be able to. Please describe.		
124	Constituent Management	Constituent Classification and Coding	Required	Users should be able to add multiple classification codes with date ranges on records to define constituent types.		
125	Business Intelligence	Tools	Required	Offer mobile reporting functionality where users can access BI tools on mobile devices.		
126	Business Intelligence	Tools	Required	Ability to connect with Power BI.		
127	Business Intelligence	Dashboards and Analytics	Required	Provide dashboards and data visualization tools to track key metrics.		
128	Business Intelligence	Dashboards and Analytics	Required	Offer variety of data visualizations, such as bar and line graphs, maps, pie charts, etc. Specify available visualization options.		
129	Business Intelligence	Dashboards and Analytics	Required	Provide tools for users to create their own dashboards and visualization without advanced programming knowledge.		
130	Business Intelligence	Report Suite	Required	Run reports with real-time or near-real-time data. Specify system reporting capabilities.		
131	Business Intelligence	Report Suite	Required	Access to a suite of standard reports. Reports should have optional parameters for users to select, such as date ranges or campaigns.		
132	Business Intelligence	Report Suite	Required	Users can select parameters and filter settings on a standard report and save a "new" version of the report with their chosen settings. The new report is added to the report library and available to be used again in future.		
133	Business Intelligence	Report Suite	Required	Provide report library to end users. Users can view a list, description, and sample or preview of all available reports.		
134	Business Intelligence	Report Suite	Required	Ability to export reports to Word, Excel, PDF, etc. List available formats for export.		
135	Business Intelligence	Report Suite	Required	Ability to schedule reports to run.		
136	Business Intelligence	Report Suite	Required	Ability to have report results emailed to selected user or group of users. Approved users have rights to manage the distribution list.		
137	Business Intelligence	Report Suite	Required	Users have access to a user-friendly report-builder tool to produce custom reports. Specify which tools are supported.		
138	Business Intelligence	Report Suite	Required	Custom reports can be added to report library to be accessible to end users.		
139	Programs	Provider Management	Required	System should centrally manage providers as a key stakeholder group. Key needs include: managing outgoing grants, procurement efforts, and contracts.		
140	Programs	Youth Programs	Required	System should be able to maintain records for community-based organizations, local schools and charter schools, including teachers, educators and counselors within the record.		
141	Programs	Youth Programs	Wishlist	System should support metrics tracking for TANF and discretionary grants.		
142	Programs	Youth Programs & Priority Populations	Required	System should track and identify providers and participants that are co-enrolled in WIOA and non-WIOA programs.		
143	Programs	Learn and Earn	Required	System should support acceptance of applications, ideally through the P4W website. Please describe.		
144	Programs	Learn and Earn	Required	Application data should feed into a constituent record, including creation of a new record for first-time applicants. Please describe.		
145	Programs	Learn and Earn	Required	System should store corresponding documents, such as onboarding documents and consent forms.		
146	Programs	Project Management	Required	System should avail program staff to all available PM tools in template form for immediate use		
147	Programs	Priority Populations	Nice to Have	System should update program charters in active implementation phase		
148	Programs	Priority Populations	Required	System should notify staff when reporting deadlines are in the near future (1 week nudge)		
149	Programs	Priority Populations	Required	System should notify Priority Population staff of submitted quotes or proposals in response to active procurement		
150	Programs	Priority Populations	Required	System should support metrics tracking for discretionary grants.		
151	Industry Partnerships	Industry Partnerships	Required	System must offer a comprehensive view of stakeholder touchpoints. Please describe system's capabilities in detail.		
152	Industry Partnerships	Industry Partnerships	Required	System must have the ability to store constituent notes. Describe any limitations, including word count.		
153	Industry Partnerships	Industry Partnerships	Required	System must support RSVPs, or the creation of forms, for small gatherings and stakeholder events. Please describe.		
154	Industry Partnerships	Industry Partnerships	Required	System must allow P4W to customize categories for company-level programs.		
155	Policy	Policy	Nice to Have	System must have a robust legislative update system, or connection to a common platform, for cataloging current elected officials with continuous updates.		
156	Policy	Policy	Required	System must support tracking of government and elected officials as a constituent type.		
157	Advancement	Prospect Research	Required	System should store research and rating information.		
158	Advancement	Prospect Research	Required	Users need to assign multiple ratings (e.g. capacity, engagement, inclination) with dates, sources and notes. system should provide tools to rate or prioritize prospects.		
159	Advancement	Prospect Research	Required	Ratings should be distinctive and easily included in list criteria or outputs.		
160	Advancement	Prospect Research	Nice to Have	System should store prospect wealth and asset details (e.g. real estate, gifts to other organizations, stock holdings) on the prospect's record.		
161	Advancement	Prospect Research	Nice to Have	System should have native prospect research tools, or ability to integrate to prospect research tools (e.g. Candid).		
162	Advancement	Prospect Tracking	Required	System should support prospect lifecycle tracking (e.g. discovery, cultivation, solicitation and stewardship).		
163	Advancement	Prospect Tracking	Wishlist	Prospect managers should be able to update the stages of their prospects, but also rely on programmed workflows or automations to trigger coding updates.		
164	Advancement	Prospect Tracking	Wishlist	System supports action tracks both by manual process and by triggers from constituent coding assignment.		
165	Advancement	Prospect Tracking	Nice to Have	System should facilitate regular review or analysis of prospects awaiting additional qualification activity or portfolio assignment.		
166	Advancement	Prospect Tracking	Required	System should track giving interests for the prospect, aligning prospects and donors with key P4W programs or initiatives.		
167	Advancement	Contact Reports	Required	System should store contact reports in the prospect record.		
168	Advancement	Contact Reports	Required	Through the contact report history, staff should be able to track historical interactions with prospects. System should be able to report and filter on contact reports to streamline the dissemination of prospect information.		
169	Advancement	Contact Reports	Required	Users should be able to enter contact reports directly into the system with minimal effort.		
170	Advancement	Contact Reports	Required	System should be accessible remotely and make it simple to add a contact report from a mobile device.		
171	Advancement	Contact Reports	Nice to Have	Users should be prompted to update related prospect data such as next step or prospect stage upon entry of a new contact report.		
172	Advancement	Proposals	Required	System should allow staff to track giving opportunities for prospects on a proposal record. The proposal record should include fiscal year, ask amount, ask date, expected amount, expected date, proposal stage, solicitor assignments, and purpose.		
173	Advancement	Proposals	Required	The proposal record should include a percentage likelihood for pipeline reporting.		
174	Advancement	Proposals	Required	Users should be able to distinguish between active and inactive or completed/closed proposals.		
175	Advancement	Proposals	Required	Users should be able to track whether the proposal is a cold send or an invitation to submit.		
176	Advancement	Proposals	Nice to Have	System should track comprehensive or blended asks and support multiple year asks.		
177	Advancement	Proposals	Required	Users should be able to record and link activities, strategy notes, and next steps to proposals.		
178	Foundations and Grants	Grant Solicitation Management	Required	System should store information related to grant proposal requirements, such as deadline dates, application requirements, and areas of focus, on the prospect record.		
179	Foundations and Grants	Grant Solicitation Management	Required	System should allow staff to add information about the specific request (e.g. purpose, type, ask amount, ask date, grant term).		
180	Foundations and Grants	Grant Solicitation Management	Required	System should store reasons for declined proposals.		
181	Foundations and Grants	Grant Solicitation Management	Required	System should support tracking team action steps toward grant proposals and relationships, including status and related tasks to support each grant submission.		
182	Foundations and Grants	Grant Financial Management	Required	System should support the submission of grant reports to funders, tying a grant proposal's submitted budget to the actual expenditure of the granted funds.		
183	Foundations and Grants	Grant Financial Management	Wishlist	System must support the tracking of financial expenditures in a grant budget, including storage of documents based on the grant record and requirements, for both restricted and unrestricted gifts.		
184	Communications	Communication Planning	Required	System must provide the ability to preview emails before sending.		
185	Communications	Communication Planning	Required	System must provide the ability to schedule mass emails.		
186	Communications	Communication Planning	Required	System must provide the ability to send emails to specified lists based on contact fields, or by project, event, committee, etc.		
187	Communications	Communication Design	Required	System must offer customizable templates that staff can manipulate, based on communication type, including e-mail, SMS, and printed communication efforts.		
188	Communications	Communication Design	Required	System should have responsive design that supports communication efforts across the organization.		
189	Communications	Communication Design	Required	System email tool must support A/B testing.		
190	Communications	Communication History	Required	Users can see all interactions with a constituent on one screen.		

191	Communications	Communication History	Required	System should store the interaction date, type, and details of the specific contact.
192	Communications	Communication History	Required	Users should be able to sort interactions by type and date. Users should be able to use communications details when creating lists and queries either to include or exclude records from the result set.
193	Communications	Communication History	Nice to Have	Users should be able to see communication actions for recipients, such as: opened, read, or forwarded.
194	Communications	List Management	Required	System must provide a way for the public to sign up for P4W mailing lists. P4W would like to include a process to approve newsletter signups. Please discuss system ability to do so.
195	Communications	List Management	Required	System should produce reliable data lists for multiple channels (e.g. mail, e-mail) based on user-defined criteria and constituent communication preferences.
196	Communications	List Management	Required	List building tool should empower staff to create lists themselves, with no reliance on technical programmers or the vendor to pull lists.
197	Communications	List Management	Required	System should allow staff to segment and manage constituent lists.
198	Compliance	Provider Records	Nice to Have	System should provide notes fields or custom fields to support policy information for provider records.
199	Compliance	Provider Dashboards	Required	System should support performance, contract, and law/policy compliance monitoring dashboards by provider.
200	Compliance	Custom Forms	Required	System should have custom form creation tools. Forms must be configurable to capture necessary data points and adaptable to changing program requirements.
201	Compliance	Custom Forms	Required	System should integrate data collected from custom forms into the CRM. The integrated data should be real-time to support ongoing analysis and updates.
202	Compliance	Custom Forms	Nice to Have	Custom forms should support various field types, including text, checkboxes, dropdowns, and date selection dropdowns.
203	Compliance	Custom Forms	Nice to Have	Custom forms the forms should have conditional logic capabilities that enable dynamic field visibility based on previous answers, enhancing the relevance and efficiency of data collection.
204	Compliance	Triggers and Automated Workflows	Nice to Have	System should trigger automated workflows that assign tasks, send notifications, or update provider risk assessments based on data entered in custom forms.
205	Compliance	Data Analysis Tools	Nice to Have	System should offer tools to analyze data collected through custom forms, including: generation of customized reports, dashboards reflecting real-time data, and trend analyses to monitor provider compliance over time.
206	Fiscal	Centralized Information	Nice to Have	System should support ability to store fiscal data for supporters, such as amounts, parameters, and pertinent details.
207	Fiscal	Centralized Information	Nice to Have	System should support centralized record needs, including invoice tracking, invoice receipts and invoice paid status.
208	Fiscal	Centralized Information	Nice to Have	System should support centralized provider communication tracking, including budget modification agreements.
209	Procurement	Centralized Information	Nice to Have	System should support centralized record needs for procurement, including: contact efforts, application status, flags (e.g. MWDBE: Minority, Women, or Disadvantaged Business Enterprise), and associated industry.
210	Project Management	Project Management Tools	Nice to Have	System should offer project management tools, or integration to a project management system. Please describe native tools or integrations of your system.