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**Request for Proposals**

CRM Software

**Proposals Due:**

June 21, 2024 at 11:59 pm EDT

Partner4Work

650 Smithfield Street, Suite 2400

Pittsburgh, PA 15222

[rfp@partner4work.org](mailto:rfp@partner4work.org)

**RFP Release Date:**

May 22, 2024

**Partner4Work (TRWIB, Inc.) is an equal opportunity employer.**

**Auxiliary aids and services are available upon request to persons with disabilities.**

# Any agreements resulting from this RFP will be funded 0% through Federal Funding and 100% through Non-Federal Funding, and M&G costs via Partner4Work as the grant recipient.

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# Introduction

## About Partner4Work

Partner4Work (P4W) is a Pittsburgh area workforce development organization that connects funding, expertise and opportunities for employers, job seekers, agencies, and policy makers to develop a thriving workforce. Formerly known as the Three Rivers Workforce Investment Board, the organization was established by the Workforce Investment Act of 1998 (WIA) and was later reauthorized by the Workforce Innovation and Opportunity Act of 2014 (WIOA). Since 1998, Partner4Work has worked to create partnerships across Pittsburgh and Allegheny County with a focus on strategic and systemic workforce solutions. With a budget of more than $30 million in public and private funds, Partner4Work has a comprehensive portfolio of programs and initiatives, all seeking to meet the current and future needs of employers and job seekers. In the last few years, Partner4Work has doubled in size and has been adaptive to the needs of businesses and job seekers alike. In the coming years, Partner4Work is poised to explore strategic opportunities and continue to build a more robust, equitable, and sustainable workforce development ecosystem for the communities it serves. Partner4Work values its unique position as connector, convener, and bridge builder to encourage collaboration, inclusion, and bold thinking in its community.

## Project Background and Current Systems

The organization’s recent strategic planning process identified the need to strengthen P4W’s ability to track and influence key relationships, build a network of partner organizations, and synthesize disparate data sources into meaningful dashboards that support communication and program evaluation.

As Partner4Work looks to strengthen its ability to track and influence key relationships as overarching workforce development strategies, the organization assessed its data management needs. Through the review of current systems and processes, Partner4Work acknowledged that it does not have a common system to manage, track, and report on the full lifecycle of organizational efforts.

***Current Roadblocks***

* Partner4Work does not have a central system to track, foster, or develop comprehensive relationship building. Current efforts to manage relationships are siloed by department and function.
* Partner4Work has several systems in use with no integrations in place.
* Due to system limitations, staff are using many manual processes to track information.
* Partner4Work is required to use CWDS, also known as the Commonwealth Workforce Development System, to track some programs and related data. Integration to CWDS is not an option.

#### Current Ecosystem

The following chart on pages 7-8 encompasses all major platforms utilized at P4W. See [Section 7.3](#_heading=h.1ci93xb) for more details on integration needs.

| P4W System | P4W Business Purpose | CRM Integration | CRM Consideration |
| --- | --- | --- | --- |
| Arc GIS | Mapping system to geocode addresses for spatial grouping | No | Retain |
| Asana | * Project management * Provider invoice submission and tracking * Program management and tracking * Provider contract change requests and tracking * Provider performance notes and tracking * Program report storage | To consider | To consider |
| Basecamp | * Communication with providers * Provider portal | To consider | To consider |
| Campaign Monitor | * External marketing and communication * List management and segmentation | To consider | To consider |
| Create Send | External website content management system | To consider | To consider |
| CWDS | * Commonwealth Workforce Development System, a required system that serves as a state portal for job seekers, employers and service providers. All WIOA participant level data is required to be entered and tracked here. * Fiscal staff for financial reporting | No | Required system; Retain |
| Delivery Slip | Secure email system for communicating and sharing PII | No | Retain |
| Financial Edge | * General Ledger * Financial reporting | No | Retain |
| Formstack | Provider signatures for the Learn and Earn program; connected to Salesforce | To consider | To consider |
| Google Sheets | Various levels of tracking, lists, and reporting across all teams at Partner4Work | To consider | To consider |
| HubSpot | Constituent relationship management and communication tracking used by some members of the Industry Partnerships team | To consider | To consider |
| Miscellaneous  (i.e., Word, Excel)\* | Various levels of tracking, lists, and reporting across all teams at Partner4Work | N/A | Reduction of manual tracking via CRM |
| Parley Pro | Provider contract and budget management | No | Retain |
| Power BI | Monthly and quarterly reporting created by the Data team as requested | To consider | Retain |
| RStudio | Statistical analysis tool used by the Data team | To consider | Retain |
| Salesforce | System of record for the Learn and Earn program | To consider | To consider |
| SignNow | Document signatures used by Adult Program team | To consider | To consider |
| SmartSheets | Communication tool for use with select providers | To consider | To consider |
| Social Sprout | Social media management tool | No | Retain |
| WIPS | Required system used by the Adult Program team, known as the Workforce Integrated Performance System | No | Required system; Retain |
| Word Press | Internal Website | To consider | To consider |

## Organizational Strategic Priorities

In 2022, Partner4Work completed a comprehensive organizational [strategic plan](https://www.partner4work.org/uploads/p4w-strategic-plan_12-12-22.pdf)ning process. Through the process, Partner4Work identified that to advance its mission and vision, the organization will focus on four priorities:

1. Advance and deliver effective, inclusive, and user-centered programs that build a stronger regional workforce.
2. Convene and influence local leaders to support data-informed decision-making and fieldwide innovation.
3. Expand name recognition, credibility, and value proposition among key partners.
4. Bolster organizational infrastructure to support innovative programs and sustainable impact.

## CRM Strategic Priorities

P4W is focused on the following strategic priorities when considering a CRM system selection and implementation:

* **Centralize information**. Partner4Work does not have a source of centralized information. Each functional team has its own processes to manage information, and in some cases, teams are using individual or shared spreadsheets to track relationships and connections. The absence of a centralized system creates the need for workarounds, including manual processes for organizational constituent management and reporting. Partner4Work needs to know how its relationships connect both internally and externally to identify and act on opportunities that will expand its value proposition across the community.
* **Build a data-driven approach**. Partner4Work needs a data-driven approach and defined data management philosophy that includes defining common organizational data points, documenting expectations for data entry and data management, and outlining essential data points for collective use in organizational metrics and dashboards. Creating a data-driven approach will allow Partner4Work to assess its progress and adjust, increase, or decrease its efforts in specific areas in real time.
* **Leverage business intelligence**. In recent years, Partner4Work implemented Power BI for most organizational reporting. However, lack of centralized information creates a need for manual data collection to build meaningful reports. The ability to create comprehensive reports is crucial to measure success in P4W’s innovative programs and to identify areas of opportunity.
* **Increase efficiency**. Many teams at Partner4Work have created workarounds due to the lack of centralized systems, including manual processes to track information and supplementary systems to fulfill a specific need. These disparate data sources have created an overlap in information management. Partner4Work must lay the foundation of strong organizational infrastructure to influence its programs and its impact, eliminate disparate data sources, and increase staff efficiency by eliminating time spent on manual tasks.
* **Implement a functional data ecosystem**. Based on the complexity of the organization, a single system will not meet all the needs of Partner4Work. To increase efficiency, centralize information, and effectively report on outcomes, Partner4Work must clearly define system roles, consolidate and/or eliminate systems, and integrate systems where possible to build a functional data ecosystem that is interoperable in support of all four identified strategic priorities.

## CRM Considerations

This section serves as a high-level overview of Partner4Work’s considerations for selection, implementation, and initial use of a CRM system. [Section 7](#_heading=h.44sinio) and [Section 8](#_heading=h.3o7alnk) outline high-level descriptions of CRM system requirements to complement the detailed System Requirements Checklist.

Critical business needs for a CRM system at Partner4Work include:

* *Participant relationships* – Currently, it is not possible to track all services a participant receives across multiple programs and providers.
* *Partnerships* – Similar to participant relationships, it is not possible to comprehensively track partners, staff members within partner organizations, and how P4W has engaged with partners over time.
* *Public engagement* – P4W has a variety of outreach efforts as a convener. Currently, there is no way to evaluate yield or related outcomes.

While Partner4Work would like to select a CRM system that supports all three needs, the organization will prioritize **partnerships** and **public engagement** in initial CRM implementation and use.

Designing and implementing a CRM system will be an iterative approach at Partner4Work. Partner4Work is seeking a CRM system to serve as a critical piece of an overall functional ecosystem, which will ultimately support business intelligence and data-driven decisions, including:

* *Outreach* – Ability to see and/or coordinate outreach efforts to all current and potential P4W stakeholders.
* *Program outcomes* – Ability to support consolidated data collection and reporting efforts for programs and related outcomes.
* *Participant outcomes* – Ability to access and/or support real-time performance-related data to produce key performance indicators (KPIs), such as enrollment metrics and participant outcomes.
* *Project management* – Ability to provide and/or connect to project management tools, to streamline communication between P4W and their providers by tracking deadlines, sharing documents, and managing tasks.

# Process Overview

The system evaluation and selection process will have three phases:

1. The first phase includes the distribution of this Request for Proposal (RFP) and the evaluation of responses. This RFP contains the defined system requirements and a series of submittals that the vendors must provide. Partner4Work will evaluate the vendor responses to determine which system offering provides the closest match to outlined requirements.
2. Following the proposal review, Partner4Work will select the vendors for demonstration and provide demonstration scenarios. The scenarios will be specific to Partner4Work’s requirements. If selected, vendors will receive the scenarios in advance of the demonstration to allow time for preparation. Partner4Work will award each vendor points based on a predetermined evaluation grid. Partner4Work may request a follow-up demonstration to review specific topics.
3. Partner4Work will make its preliminary selection and proceed with reference checking and other due diligence activities. Partner4Work will request a standard contract at this time. Based on the results of the due diligence and contract negotiation, Partner4Work will make its final selection. Upon the completion of the due diligence, Partner4Work may determine, in its sole discretion, not to select any vendor and to initiate another search or end the search altogether.

# Vendor Submission Requirements

To be considered, each vendor must complete and submit the following information. The information required may be contained in standard marketing literature. Vendor responses shall be prepared at no cost to Partner4Work.

*Note:* Partner4Work is a public entity. All materials may be subject to [Right to Know](https://www.openrecords.pa.gov/RTKL/About.cfm). Information proprietary to responding vendors must be clearly marked in RFP responses.

1) A completed Requirements Checklist (attached). *PLEASE NOTE: Partner4Work acknowledges that certain vendors invited to this RFP process may not have functionality that meets all requirement areas listed. Please respond to the areas that correlate to your product. Partner4Work appreciates any additional information you can provide regarding allied or integrated applications that may help Partner4Work build a total solution around your specific product.*

2) A completed Software Investment Summary (attached).

3) A description of the vendor company history and current operating characteristics including, but not limited to, the number of years in business, experience in the workforce development sector, number of employees, annual sales, geographic coverage, and number of clients.

4) A narrative description of the primary system components, including the database management software utilized (if applicable), any optional or modular components required to satisfy requirements presented, communication or network software, and any other features that make the system unique.

5) A description of recommended integration offerings with available functionality and associated costs. This section should also answer the following:

* Do you recommend specific integrated software or applications that will complete a total software solution that satisfies Partner4Work requirements? If so, please specify. See [Section 7.3](#_heading=h.1ci93xb) for integration system requirements at Partner4Work.
* Does your product have an API that can be used to create integrations and/or customizations?
* Do you (or your proposed implementation partner) provide integration implementation support?
* How does a developer access the API? What protocol(s) does the API utilize?
* Is the API’s functionality commensurate with the application or are there use cases that can only be accomplished with the application and not the API?
* What ongoing fees are associated with utilizing the software’s API?

6) A description of the vendor’s data security measures and cyber/disaster incident response plan including process and timeline for customer notification, including disclosure of any data breaches during the prior 24 months.

7) A description of the vendor's software support organization and methodology, including:

* + Staffing (Is support provided by the vendor or through a third party?);
  + Types of support available (Is support available via toll free telephone, online case management, online chat, online knowledgebase, user guides?);
  + Vendor’s hours of service and support;
  + Any additional charges for service outside of regular business hours;
  + Vendor’s support tiers; and
  + Rubric used for classifying support tickets along with associated response times (e.g. nuisance, significant, system down).

8) A sample of the user guide/user documentation.

9) A description of the product’s roadmap for future development, including:

* Frequency of new releases or upgrades;
* Distribution/Notification method for new releases;
* Method by which features for new releases are identified and prioritized.

10) Verification that the vendor provides a stand-alone version of the database for testing and training.

11) A description of implementation components and methodology. Include a sample implementation plan including a timeline for a similar type of organization. Include a description of project roles and which roles will require Partner4Work resources (along with time estimations). Partner4Work will accept implementation proposals from 3rd party implementation partners.

12) The names, addresses, and contact information of three (3) users of the system whose requirements most closely match those of Partner4Work.

# Contractual Status

This RFP does not bind Partner4Work. Partner4Work assumes no responsibility for the costs incurred in the preparation of a proposal or related activities of any applicant. Partner4Work reserves the right to amend or withdraw the RFP at any time in its sole discretion before the execution of the contract. Partner4Work reserves the right not to proceed to contract with any of the vendors responding to this RFP. In such event, Partner4Work shall not be liable to any proposed vendor for the costs incurred by proposed vendor as a result of the amendment or withdrawal of the RFP. The RFP has been prepared solely to solicit proposals and is not a contract offer. The only document that will be binding on Partner4Work is the contract duly executed by Partner4Work and the successful vendor after the completion of the selection process and the award and negotiation of the contract.

# Deadline For Submissions

Interested vendors shall submit their proposals in the format as specified below by June 21, 2024 at 11:59 pm EDT to the following individuals. Lengthy narrative is discouraged; presentations should be brief and concise and not include extraneous or unnecessarily elaborate promotional material. The proposal should be in a .pdf format (zipped if necessary) not exceeding 10 pages in length.

Vendors must forward responses to the following individuals by **11:59 p.m. EDT on Friday, June 21, 2024.** Please submit your response(s) in electronic format to:

Partner4Work Procurements

rfp@partner4work.org

Shannon Abitbol

Consultant, JCA, Inc.

[Shannon.Abitbol@jcainc.com](mailto:Shannon.Abitbol@jcainc.com)

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Vendors qualifying for the next round will be notified on or around **June 28, 2024** and will be asked to demonstrate their proposed product ***virtually* between July 15 and August 2**. Partner4Work expects each demonstration to last one day for each invited system. This includes demonstration of the core CRM system as well as any additional applications required to comprise a full solution for Partner4Work. Partner4Work will work with selected vendors to schedule the demonstrations. Additional vendor demonstrations and reference checks, if required by Partner4Work, will occur in early August 2024. Partner4Work expects to make a final selection by the **Fall of 2024.** Once the contract negotiations have been finalized, Partner4Work estimates initiating implementation of the system in **Early 2025.**

**Review Timeline**

* Release of Request for Proposals: May 22, 2024
* Due Date for RFP related questions: June 05, 2024 at 11:59 pm EDT
* Reply/Answers release date: June 14, 2024
* Proposals Due: June 21, 2024 at 11:59 PM EDT
* Next round selection: On or around June 28, 2024
* Demonstrations: Between July 15 and August 02, 2024
* Final Selection: Fall 2024
* Implementation: Early 2025

# Questions And Clarifications

All questions and requests for clarification or interpretation of the meaning of the RFP, and any other correspondence concerning the RFP, must be submitted in writing via electronic mail including all required information and addressed to the following:

Partner4Work Procurements

[rfp@partner4work.org](mailto:rfp@partner4work.org)

To be given consideration, an inquiry must be received by **Wednesday, June 5, 2024 at 11:59 pm EDT.** A compilation of all vendor inquiries and Partner4Work responses will be sent via e-mail to all vendors on or before **Friday, June 14, 2024**.

# System Requirements

## General Application Requirements

### User Access

Staff should have access to the system any time of day, from any location without hindrance to performance. It should have a web-based user interface, and staff must be able to login to the full application from any computer (PC and Mac) using any web browser. Users must also have access to the application through mobile devices. Ideally, accessing the system is direct without a need for third-party applications.

### Personalization

Staff need to be able to choose what information is displayed on their home screens, so that each individual sees items most relevant to their responsibilities. Personalization could include dashboards or widgets tracking key metrics, quick links to common functions or user notifications such as actions to complete. Staff should be able to set and store bookmarks to specific records, functions, or reports to facilitate quick access to frequently used content. Administrators should have the ability to hide or enable system areas or record areas for specific user groups to create a streamlined user experience by organization role.

### Design and Navigation

The system should have a layout that is readable, organized, and easy to navigate. It must incorporate structured design and development techniques, so screens are consistent and easy to read, navigate and maintain. It should be intuitive to the user, particularly for new users. Key constituent information, such as contact details and constituent type/primary segment codes, must be readily viewable. Staff should be able to enter data for a specific record type (e.g., constituent, event, interaction etc.) easily from one screen.

### Search Functionality

The system should allow staff to execute record searches using a combination of fields including organization, name, alias/nickname, previous names, address, email, or phone number. The system should allow staff to search by different record types (organization, partner, individual) and by categories as defined by Partner4Work. It should allow the user to refine its search criteria by using “wild card” and/or partial string search options.

### Business Rules and Workflows

Business Rules should include the option to set specific fields (e.g., email, system IDs, aliases) as unique identifiers to minimize record duplication. The 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.

### Imports and Exports

The 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). The system must be able to import and export biographic data, interactions data, engagement data, survey results, and other information tracked by various departments within the CRM. Staff need to be able to import and export any field that is available in the system and import and export different types of records simultaneously. The system should store templates for imports and exports with user-specified data fields to allow less technical staff to capture new data or update existing data. Staff should have ability to download or review import and export templates prior to creating import and export files to ensure completeness of data and inclusion of appropriate fields. The system should have the ability to rename columns in import and export files.

### Queries and Lists

The system should facilitate the creation of lists using diverse criteria. To facilitate this, staff need a user-friendly query tool that allows them to retrieve specific data from any table within the database. All fields in the database must be accessible as query criteria and outputs. The query tool should not require special programming knowledge and should have common operators for creating query logic (for example: greater than, less than, equal to, contains, null/not null, begins with, etc.). Querying a certain field returns all results, not just most current value (i.e., a query for email returns ALL active email addresses). The system should save queries for future use and be able to merge several pre-existing queries and/or query results. Staff should be able to add records manually to a query selection, one at a time or by importing record IDs or merging lists together. Query output should include fields that are not in the query selection criteria. Results should be easy to read, and the display should offer options for how the user wants to see the data.

## Database Administration

### Audit Trail and History

The system should retain all historic data with no date limitations. Any deletion or removal of system data should be client directed. The system should create an audit trail of changes to the database. The audit trail should include the before and after values, the date of the change, the user who made the change, and the data source. Ideally, the system should provide ability to archive and easily restore archived records. The system should be able to produce a report of all changes made to the database based on date range, for all fields. The report should allow filtering by system user and summarization by change or record type. Staff should have the ability to export data or establish integration workflows utilizing date last changed criteria.

### Hosting, Performance and Environments

P4W prefers software as a service (SaaS) solution or a cloud-hosted system where the vendor is responsible for server management. 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. The 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.

### Security

The system needs to limit access to only internal P4W employees by functional department area. Users external to P4W must not be able to access the system. Different teams within P4W may require access to different areas of the system. The system should set security permissions by user group or role. Based on permissions, the system should limit view, add, edit, and delete functions for users. Security permissions should be set for functions, screens, constituents, record types, and fields. Administrators should have the ability to “impersonate” other users/roles in the system to troubleshoot problems with access and permissions. The system should also set security for reports and documents. The vendor must demonstrate a strong history of information security compliance.

### System Configuration

Staff need to set field values, requirements, and alerts through a configuration module. It should allow designated staff to rename fields as needed, hide fields, encrypt sensitive data fields and set fields as required. The system will prevent users from saving records without completing required fields. It should allow designated staff to create custom alerts or notifications that display when specified constituent records are opened. Ideally, the system will allow administrators to configure the field layout of specific data screens to customize the interface in a way that prioritizes data points that are critical to P4W and hides or minimizes others that are not.

The system should allow authorized staff to create custom fields and tables to accommodate its unique business needs. Authorized staff should be able to specify a format (e.g., number, date, text) 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. Ideally, administrative staff would have the ability to add or insert custom fields where most appropriate. Custom fields should be able to be set as exclusive or one to a record as needed.

### Duplicate Management

The system should support use of user-defined criteria for duplicate checking. Record matching should include options to match to various system fields (address, email, alias). The system should notify a user before adding a potential duplicate to the database. The system should routinely alert users to potential duplicates upon record access and allow staff to resolve or dismiss duplicate notifications. Staff need to be able to identify and merge duplicate constituents individually or in bulk and reverse merges as needed. The merge process should allow staff to choose the specific data fields to merge into the primary record that will be kept.

### Data Maintenance

The 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). The 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). Staff need to be able to make changes to constituent records globally in bulk (e.g., add, update, delete).

### Vendor Support

P4W requires a vendor with deep experience in community-building nonprofit sector, preferably workforce development nonprofits. Vendor support must be consistent and reliable. The vendor should maintain a history of reported problems and fixes accessible to system administration staff. The vendor should have the ability to review and remedy issues remotely. Staff must have direct phone support and/or live chat available during P4W operational hours. The vendor should provide documentation for end users and an online resource center. The vendor should have a commitment to regular upgrades and good communication with clients regarding fixes, patches, and updates. Training options for the system should include online, on-site, and classroom sessions. Training should include curriculum pathways that focus learning for end-user, system administration, reporting and business intelligence training needs.

## Integrations

P4W is interested in understanding existing integrations between the CRM system and P4W systems, including existing iPaaS tool integrations or opportunities for developing custom integrations. The system should have robust APIs that demonstrate the vendor’s ability to integrate with third-party applications.

### Website

The CRM must integrate with P4W’s website. The system must support customizable landing pages and redirect pages that connect to web pages for web forms. The website and web forms must offer both hidden and viewable options for e-mail and SMS opt-in, also connecting to various P4W web pages. Staff should be able to manage the layout and main content of the pages to ensure that the look and feel are consistent with the main website. All public-facing pages must have responsive web design to adapt to whatever device the customer is using. The system should have the ability to enter data from web forms directly into existing records, or create new records.

Currently, the Learn and Earn program uses a web form for its application process. Ideally, a CRM system will support applications via the P4W website that connect to the CRM. The system should offer the ability to create an online portal with a personal log-in. Logged-in customers should be able to update personal information such as address, phone, email, and communication preferences, and the system should keep an audit trail tracking the source of the changes.

### Email Communication

P4W must be able to connect the system with email tools. Staff use Gmail as their daily email platform, but are in the process of moving to Microsoft. Ideally, the CRM system will allow connection to an email client for integrated contact management. P4W would like to explore the ability to connect to calendar functions within their P4W email (i.e., Outlook or Gmail). P4W also communicates through Campaign Monitor for mass email communication needs. The system must provide a native email tool consistent with the functions of Campaign Monitor or integrate effectively to the current solution for a holistic view of constituent engagement.

### Provider Communication

P4W communicates with providers and coordinates details through Asana and Basecamp. Centralized relationship management is a critical need, including the ability to view touchpoints comprehensively.

### Legislative Tracking

P4W needs to track legislative engagement, relationships, and actions. Although not currently in the P4W ecosystem, the organization may need to consider this type of system, and if so, its integration to its CRM system. Ideally, P4W would like the following legislative tracking capabilities:

* For Legislators' offices: the ability to specify items such as:
  + Federal, State, Local;
  + House / Senate;
  + Political Party;
  + District;
  + Committees/Subcommittees
* For other government offices: the ability to search by specific departments or bureaus within an agency.

### Project Management

P4W currently uses Asana. P4W needs to explore the ability to integrate its common tools, though an integration to Asana may not be deemed critical. However, integration to a common project management tool could significantly increase efficiency and reduce overlap at P4W.

## Constituent Management

### Biographic Management

The system should serve as the place to maintain central records, storing multiple addresses, phone numbers, and email addresses. The system should store information for different record types including individuals, groups, and organizations. It should save full organizational names, as well as abbreviated versions and acronyms. It should store preferred names, aliases, titles, suffixes, and professional titles.

### Constituent Types

Partner4Work is not a direct service provider or a direct fundraiser with traditional nonprofit relationship management needs. P4W requires a system that is both robust and flexible in meeting its unique constituent management needs and storage of constituent types.

The system should have the flexibility to manage multiple constituent types, such as current and future funding sources (i.e., foundations, corporations), program providers, program participants, area employers, workforce development influencers, community partners, individuals, and policy makers. P4W staff require a system that can support a hierarchy of contacts within its constituent records, including: providers, employers, foundations, board members and grantmaking organizations.

### Name Formats

The system should store multiple addressees and salutations within the constituent record. Name formats may use preferred names. The system should enable staff to set rules for how they address constituents in correspondence. It should allow staff to mark an addressee or salutation as primary. The system should automatically create default addressees and salutations that staff can override, and it should prevent system updates to the customized addressees and salutations. The system should also support custom name formats used for recognition or distinct communication purposes. Custom formats should have unique type codes that are user-defined.

### Relationships

Staff should be able to create relationship links between constituent records in the system. All relationships must be qualified by a type describing the nature of the relationship (e.g., partner, employer, etc.). The system should permit user-defined relationship types. The system should save start and end dates on relationships. The system must allow for multiple relationship types, as P4W stakeholders often serve more than one role.

P4W maintains relationships with many organizations. The system should allow staff to link contacts to organizations and assign contact types (e.g., organizer, executive contact, grant contact). 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. The system should allow P4W to designate a singular contact, listed as any contact type, as the “Primary” contact. The system should include start and end dates to track changes of the contact person for an organization. The system must enable users to address an organization as a single entity or to address selected individual contacts within the organization.

P4W needs the ability to link contacts and organizations to specific events, programs, projects, or committees.

### Notes

Users should have the ability to add free form notes and comments to records as well as link documents to constituent records. 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.

### Contact Information and Preferences

The system should allow staff to define the contact information by type and specify one as preferred. P4W needs to manage contact restrictions/preferences that apply holistically to a constituent as well as the ability to tag contact channels for specific preferences or program needs. Users must be able to specify contact type as a customizable field. 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."

### Affiliations

Understanding community and professional affiliations for P4W’s network is important. Ideally, affiliation selections should be tied to a standardized list of options, making them easily searchable or available as list criteria. P4W should also have the flexibility to define categories of affiliations.

### Interests

P4W needs to track interest across its programs and workforce development focus areas. The system needs a robust and flexible coding system to capture and manage this information. The system should enable designated users to import and apply codes to records in bulk fashion (or via automated processes). Interest codes must be available to apply as criteria in list creation.

### Constituent Classification and Coding

The system should allow P4W to classify its constituents according to multiple diverse needs. Staff should be able to add multiple classification codes with date ranges on records to define constituent types. Staff need to be able to create a hierarchy of constituent codes to allow for mutually exclusive groupings based on top affiliation to P4W.

### Relationship Managers

The system should track data related to the relationship manager of P4W-defined stakeholders. Manager roles should include active data periods and the ability to store notes relevant to the relationship or assignment. The system should keep a history of prior relationship managers in the organization. P4W should have access to their assigned relationships and the system should present their assignees in ways that are easy to view and manage. It should be easy to create and assign (or reassign) a relationship to other P4W staff.

## Business Intelligence

The database should allow the creation of custom reports using standard reporting tools. Experienced users need the ability to customize standard system reports. Business intelligence tools should be accessible to users to explore and interact with information in the database to inform decision-making. The business intelligence tools should not tax the live database to the point where it slows transactional performance; a replicated data set for reporting may be preferred. Replicated data should be accessible by an external reporting tool.

P4W currently utilizes PowerBI to analyze and visualize data. Ideally, a CRM system will have a connection to Power BI to support organizational reporting needs.

The system should provide access to a suite of standardized reports where staff can configure the format (pie, bar graph, etc.) and data parameters, which will allow for easy filtering of results. Users should be able to run standard reports easily, with minimal training as well as create and save unique versions of regular reports specific to their needs. The system should give users the ability to schedule a report to run automatically and email the report to a user-defined list of recipients or to save to a user-defined destination. Users need to be able to export reports in a variety of formats, including PDF, Excel, and Word.

The system should provide dashboard and data visualization tools that enable staff to have custom views of defined key performance indicators (KPI). P4W needs to be able to view dashboards in real-time or near-real-time. Staff need to create and configure their own custom dashboards with department specific KPI dashboards to track the progress of efforts most pertinent to their program.

# Functional Requirements

Partner4Work requires a central constituent relationship management (CRM) system that supports the interconnected nature of its work. System requirements in [Section 8](#_heading=h.44sinio) outline what all teams need in a CRM system, including constituent management, business intelligence, and integrations to current and future P4W systems. This section provides high-level context to the business areas of P4W, describes the interconnectedness of organizational teams, and explains why centralized information is critical. Functional system requirements of these teams are outlined thoroughly in the Requirements Checklist.

## Programs

Programs at P4W can be divided into three main groups: Adult and Priority Population Programs, Youth Programs and Learn & Earn. For some programs, CWDS is a required system of record. However, CWDS does not serve as a central source of information for the entire organization or all P4W efforts. CWDS is a source of information for some teams, including P4W program teams, but is not an active database for P4W.

The programs teams need a CRM system to:

* Centrally manage stakeholders and their relationships to P4W,
* Centrally manage providers, including outgoing grants, procurement efforts, and contracts, and
* Centrally report on program efforts, outcomes, and opportunities.

This section provides context for all P4W program efforts and their related focus areas.

### Adult and Priority Population Programs

Adult and Priority Population Programs manage funding that comes in through federal grants for job seekers who are aged 18 or older. This team does not work directly with job seekers or individuals; by maintaining contracts with employers, service and/or training providers, the Adult and Priority Populations Programs teams increase opportunities for those individuals with barriers to employment. Some of their initiatives are funded through WIOA and TANF grants, which require CWDS to be the system of record; other projects are funded through the Department of Justice and other discretionary grants require external systems of record.

### Youth Programs

Youth Programs partner with community-based organizations as well as local public and charter schools to ensure the next generation of talent is prepared to keep the region working for years to come. The team also creates resources that teachers, educators and counselors can use to incorporate work-based education experiences into students’ schedules to help meet graduation requirements.

While WIOA grants have a specific set of metrics that must be reported through CWDS, TANF and discretionary grants do not require the same level of detail; therefore, P4W have developed their own set of metrics to measure success for these programs. Some providers and participants are co-enrolled between WIOA and other programs, which adds a layer of complication to gathering and measuring information. Pennsylvania has begun to require more TANF youth reporting in CWDS, but there is no definitive path for the future of this reporting. P4W needs access to comprehensive reporting tools in a CRM system.

### Learn & Earn

Formerly under Youth Programs, Learn & Earn is open to young people ages 14 to 21 who meet certain income and residency requirements. They are matched to job opportunities based on interest, experience, skills, and access to job sites (e.g. geographic proximity, transportation availability), and work at sites across the county in corporations, nonprofits, and community-based organizations. Program applications are accepted in the spring; recruitment for worksites continues year-round.

In 2016, the Learn & Earn team implemented Salesforce to streamline and digitize their application process. Salesforce is connected to the P4W website for Learn and Earn applications, with the data feeding into constituent records in Salesforce. They have also designated a member of the Data team to be their Salesforce administrator. While the team is successfully using Salesforce to modernize their processes, it remains a standalone system that is only used by Learn & Earn. There are many points of overlap with the Adult and Youth Programs teams, including onboarding documents, consent forms, and service providers. Although P4W must continue to use CWDS for constituent management efforts, a centralized CRM system will allow the organization to reduce some duplication.

## Industry Partnerships

The Industry Partnerships team seeks to build proactive, strategic relationships with employers across the Advanced Manufacturing, Clean Energy, Construction, Finance, Healthcare and STEM/Robotics industries in Pittsburgh and Allegheny County.

The team needs a comprehensive relationship management platform to view, assess, and act on current and potential touchpoints that employers have across P4W. Transparent communication with key stakeholders is a critical need for this team. Industry Partnerships often holds meetings and gatherings with area employers and key community members to share real-time workforce development information. The Industry Partnerships team needs the ability to track connections, notes, and RSVPs for meetings and small events. The team would like to have a CRM tool with built-in email functionality that connects to a constituent (individual or organization) record. The team often interacts with many employers and providers that are connected to the program teams with no awareness of the content or product of previous or ongoing communication efforts.

The team must also be able to identify and track prospective employers for strategic relationship opportunities, and easily identify where proactive information can affect policy decisions and increase buy-in from area employers. Partner4Work needs to be able to customize categories for company-level programs.

## Policy

The Policy team performs policy research, engagement, tracking, and analysis in support of P4W programs and the overall local workforce development landscape. The Policy team works closely with all areas of P4W to navigate legislation and related policies that affect P4W workforce development efforts. Currently, the Policy team manages information in spreadsheets and ad hoc documents.

Like other teams, the Policy team needs a central location to track key stakeholders and their related connections. Additionally, this team wants to expand relationship-building efforts with government and elected officials as a key strategic priority.

## Advancement

Advancement at P4W focuses on foundations and corporate relationships, but not on individual fundraising efforts. The Advancement team needs a system that can support centralized constituent management, making all connection points visible and supportive of relationship-building efforts.

### Prospect Research

P4W currently researches prospects outside of organizational systems. The Advancement team needs a native prospect research tool within the CRM, or the ability to integrate to prospect research tools (i.e., Candid) to allows the organization to connect potential giving information to a constituent record, such as research and rating information.

### Prospect Tracking

The system should support prospect lifecycle tracking (e.g., discovery, cultivation, solicitation and stewardship), and the Advancement team should be able to update the stages of their prospects. The system should facilitate regular review or analysis of prospects awaiting additional qualification activity or portfolio assignment through classification and ratings systems for qualified prospects. The system should also track giving interests for the prospect, aligning prospects with key P4W programs or initiatives.

### Contact Reports

The system should store contact reports in a prospect record. Through the contact report, staff should be able to track historical interactions. Staff should be able to enter contact reports directly into the system with minimal effort. The system should be accessible remotely and make it simple to add a contact report from a mobile device.

### Proposals

The system should allow staff to track giving opportunities for prospects on a proposal record. Staff should be able to distinguish between active and inactive or completed/closed proposals. The proposal record should include a percentage likelihood,, whether P4W has been invited to submit the proposal, or whether the proposal is a cold send. The system should track comprehensive asks and support multiple year asks. Staff should be able to record and link activities, strategy notes, and next steps to proposals.

## Grant Management

In addition to large grants such as WIOA and TANF, P4W receives grants for specific programs and areas of workforce development focus. Presently, grant management is handled in spreadsheets and miscellaneous documents. P4W needs a central place to track and manage grant-related efforts and relationships.

### Grant Solicitation Management

The system should store information related to grant proposal requirements, such as deadline dates, application requirements, and areas of focus, on the prospect record. The system should allow staff to add information about the specific request (e.g., purpose, type, ask amount, grant terms, and ask date). The system should store reasons for declined proposals.

### Grant Process Management

Staff need to track grant-related activities within the system. P4W requires a system that can support tracking team action steps toward grant proposals and relationships, including status and related tasks to support each grant submission.

### Grant Financial Management

For awarded grants, the 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. The 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.

## Communications

P4W uses mass communication tools within programs and as an organization. Ideally, a CRM would offer built-in communication tools for a comprehensive view of communication efforts. At present, communication efforts are fragmented and decentralized. This section highlights the high-level communication needs for a CRM system, or integrated solution.

### Communication Planning

The system must support the tracking and analysis of communication frequency by constituent type. The system must provide the ability to preview emails before sending, as well as schedule mass emails. P4W needs an agile system that supports templates and ease of use for quick turnaround on critical, time-sensitive communications.

### Communication Design

The system must offer customizable templates that staff can manipulate, based on communication type, including e-mail, SMS, and printed communication efforts. The system should have responsive design that supports communication efforts across the organization. Templates should be saved in the system for future use. The system should store drafts and sent communications. Email tools must include both manual emails and automated emails that are triggered by workflows defined by P4W.

### Communication History

Each constituent record should include a history of communications and interactions made through newsletters, emails, invitations, and other communications. Staff need to see all interactions with a constituent on one screen. The system should store the interaction date, type, and details of the specific contact. 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. P4W would like to see communication actions for recipients, such as: opened, read, or forwarded.

### List Management

The system should produce reliable data lists for multiple channels (e.g., mail, e-mail) based on user-defined criteria and constituent communication preferences. The list building tool should empower staff to create lists themselves. The system must enable staff to select which contact preferences and contact restrictions to apply to mailing lists, to allow staff to manage exclusions at a granular level. The system should include the ability to add and remove constituents to lists individually or globally, even if they do not meet the overriding list criteria.

The system should allow staff to segment and manage constituent lists. Segmentation criteria may include program history, interests, origin source codes, or geography. The system should allow lists to be merged and prevent duplicate records in the merged output file. Staff also need to be able to use suppression lists in list merging, to exclude selected people from receiving a communication.

## Compliance

The Compliance team works closely with the Program teams to support providers, including monitoring contracts, policies, technical assistance, and performance monitoring. This team also receive data validation requests from multiple state and federal agencies. Presently, the team is using a variety of tools for monitoring and communication. While WIOA-funded programs have very specific expectations, other grants are less clear with their requirements and the Compliance team must build the infrastructure within the CRM for supporting those non-WIOA funded projects as they come to fruition.

To streamline the compliance monitoring processes at P4W, the new CRM system must incorporate functionalities that allow it to serve as the primary resource for performing, documenting, analyzing, and tracking monitoring activities. The CRM should replace P4W’s current use of various tools, including custom-made Google Forms, with a unified system that centralizes and simplifies data collection and analysis. Specific enhancements for compliance, include:

### Custom Form Creation Tools

The CRM must offer robust, user-friendly tools to create, customize, and manage forms that the Compliance team can use for various monitoring activities. These forms should be configurable to capture all necessary data points and adaptable to changing program requirements.

### Seamless Data Integration

Data collected via custom forms should automatically integrate into the CRM system, ensuring that all information remains centralized and accessible. This integration should support real-time data updates and analysis.

### Dynamic Form Functionality

Custom forms should support various field types, including text, checkboxes, dropdowns, and date selection dropdowns. Additionally, the forms should have conditional logic capabilities that enable dynamic field visibility based on previous answers, enhancing the relevance and efficiency of data collection.

### Automated Workflows and Notifications

Upon form submission, the CRM should trigger automated workflows that assign tasks, send notifications, or update provider risk assessments based on the data entered. This automation will streamline follow-up actions and ensure timely responses to compliance issues.

### Provider Dashboards, Monitoring Results Reporting, and Analytics

The CRM 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.

The provider dashboards will serve as a central hub for an array of real-time and historical data of compliance-related activities in an intuitive display to assist the Compliance team in efficiently managing and monitoring service providers.

## Fiscal

The Fiscal team is responsible for managing contracts and funding of P4W providers and subrecipients. The team uses a contract management system, Parley Pro, as well as Financial Edge for its General Ledger, budgeting, and financial reporting. While the Fiscal team will continue to use their current tools, they could benefit from a CRM system as a central source of truth of P4W stakeholders, just like other P4W teams. Key centralized record needs include:

* Invoice tracking including invoice receipt and paid status.
* Provider conversation tracking, including budget modifications.

The Fiscal team may want to consider integration to a CRM in the future.

## Procurement

Partner4Work needs the ability to comprehensively view procurement efforts in the CRM system, including:

* Procurement contact efforts
* Procurement application status
* Procurement flags (i.e., MWDBE)
* Associated industry

## Project Management

The Project Management Office (PMO) is a central point for managing information as it relates to projects, programs, and funding efforts at P4W. The team supports the organization as a central point of coordination, managing information in project management tools. Currently, the organization is using Asana. To effectively manage details, the PMO office needs a central CRM system accessible and used by all P4W staff that interact with key stakeholders to track their activity. Having one source of information would create efficiencies for the PMO.

# Appendices

* Requirements Checklist
* Software Investment Summary

## Disclaimers

* [Executive Order 2021-06, Worker Protection and Investment](https://www.governor.pa.gov/wp-content/uploads/2021/10/20211021_EO_2021-06_Worker-Protection.pdf) must be followed throughout this RFP.
* This Request for Proposals (RFP) does not commit Partner4Work to award a contract.
* Partner4Work may select a firm based on its initial proposal received, without discussion of the proposal. Accordingly, each proposal should be submitted on the most favorable terms, from a price and technical standpoint, that the bidder can submit to Partner4Work. Partner4Work may, however, have discussions with those firms it deems in its discretion to fall within a competitive range.
* Partner4Work reserves the right to request additional information from any applicant, request oral presentations from applicants, or conduct site visits from any applicant before a contract award.
* Partner4Work reserves the right to fund portions of a proposal, or to reject any and all proposals in whole or in part. Rejection of a portion of a proposal does not necessarily negate the entire proposal.
* Partner4Work may, at its discretion, adjust the level of funding provided to successful bidders under this RFP and/or consider the funding of proposals not initially funded under this RFP at a later date.
* No costs will be paid to cover the expense of preparing a proposal or procuring a contract for services or supplies.
* All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Partner4Work and be subject to disclosure under the Freedom of Information Act, Right to Know Law, or other applicable legislation.
* The contract award will not be final until Partner4Work and the successful bidder have executed a mutually satisfactory contractual agreement. Partner4Work reserves the right to make an award without further discussion of the proposal submitted. No activity may begin prior to final Partner4Work approval of the award and execution of a contractual agreement between the successful bidder and Partner4Work.
* The submission of the proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged to any other individual for the same services performed by the bidder.
* Applicants are advised that most documents in the possession of Partner4Work are considered public records and subject to disclosure. Partner4Work reserves the right to issue additional RFPs if and when it is in Partner4Work’s best interest to do so and may elect to negotiate and issue multi-year contracts to successful bidders under this or subsequent RFPs.
* All programs and activities are designated as equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Contact staff to request assistance with access to this RFP.
* Applicants must be capable of agreeing to the requirements set forth in the Partner4Work contract templates, available at <https://www.partner4work.org/document/partner4work-contract-templates/>.

## APPENDIX A

## Request for Proposals Cover Sheet

**Lead Applicant:** Click or tap here to enter text.

1. **Contact Information**

Organization Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

City: Click or tap here to enter text. State: Click or tap here to enter text. Zip Code: Click or tap here to enter text.

Principal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Fiscal Contact Person: Click or tap here to enter text. Title: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

Executive Director: Click or tap here to enter text.

Phone: xxx-xxx-xxxx Fax: xxx-xxx-xxxx Email: Click or tap here to enter text.

1. **Legal Information**

Type of organization: For-profit: ☐ Non-Profit: ☐ Government: ☐ Education Institution ☐:

Federal Employer Identification Number (FEIN): Click or tap here to enter text.

Please provide your current [Unique Entity ID](https://sam.gov/content/duns-uei) : **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Please provide your current [CAGE Code](https://cage.dla.mil/): **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. **Requirements / Documents** *(proposals submitted without these documents will be considered incomplete, please see associated links for more information and instructions as to how to acquire them) Please note that a single copy of all requirements below must be submitted for EACH Partner, in addition to the lead applicant.*

* Registration in the [System for Award Management](https://www.sam.gov/SAM/) (SAM)
* Certificate of Liability Insurance; Including Cyber Security Coverage
* Most recent financial audit*(if applicable)*
* Certificate of Worker’s Compensation Insurance*(if applicable)*
* W9

1. **Additional Requirements**

* Agree to Use Partner4Work’s Contract Management Software, Parley Pro, for Contract Negotiation
* By submitting your proposal you certify that you are compliant with the following [PA state integrity policy](https://www.health.pa.gov/topics/Documents/Administrative/contractor_integrity_provisions_7-30-10_doc.pdf). If you are not, please submit along with your proposal a written explanation of why such certification cannot be made