EmployIndy
GUIDING MARION COUNTY'S WORKFORCE

NOTIFICATION OF REQUEST FOR PROPOSALS

Provision of services for
Salesforce Migration and Integration
Issued January 27, 2020

Proposals must be received no later than
4:00 pm ET February 10, 2020

RFP# 2020-001

EmployIndy
PNC Center
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Indianapolis, IN 46204
(317) 639-4441

EmployIndy, its programs and contract service providers are Equal Opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities.

Table of Contents

Attachments
Attachment A - Salesforce Use Case
Attachment B - Use Case Contract Deliverables
Attachment C - EmployIndy Systems

I. Introduction

EmployIndy, the workforce development board for Marion County, guides the local workforce ecosystem and makes strategic investments to remove barriers to quality employment for underserved and underrepresented residents. As the workforce development board for Marion County, EmployIndy invests over $20 million in federal, state, and philanthropic funds to help job seekers access employment, education, training and support services to succeed in the labor market, and to match employers with the skilled workers they need to compete in the global economy.

EmployIndy's vision is for all Marion County residents to have access to the services and training necessary to secure a livable wage and grow in a career that meets employer demand for talent. In 2017, EmployIndy launched a five-year Strategic Plan (2017-2022) centered on three primary goals for the ecosystem:

1. Address systemic barriers preventing a strong pipeline of entry-level workers and employment opportunities;
2. Create a positive trajectory for young adults to actively participate in the workforce; and
3. Create an employer-driven urban neighborhood workforce development framework that can be replicated throughout Indianapolis.

EmployIndy meets its obligations and strategic commitments through a mix of direct service delivery, contracts to deliver specialized services, and informal coordination and influence of multiple, diverse partners present in Marion County's workforce ecosystem.

a. Career Services

Career Services are funded through Workforce Innovation and Opportunities Act (WIOA) Title I, state and local dollars to deliver employment services to Marion County residents including. These funds are primarily used for delivery of services under programs like WIOA, Wagner-Peyser, Community Development Block Grant Employment Services and R-employment Services and Eligibility Assessment (RESEA) at WorkOne Indy, at various Community Based Organizations, and at local libraries throughout Marion County.

b. Youth Services

In-school and out-of-school (opportunity) youth programs are administered via a network of Indianapolis school districts and high schools through the Jobs for America's Graduates and Indy Achieves programs and through a network of community based and youth serving organizations through the Youth Employment System (YES Indy). YES Indy provides a continuum of services that can begin at the YES Indy Re-engagement Center (REC), and include the Power Huddle, Job Ready Indy and Project Indy.

c. Business Partnerships

Understanding Marion County employers' talent needs is a crucial driver of the workforce system. EmployIndy's Business Partnerships team cultivates employer relationships, develops opportunities for employers to influence and engage the work of our ecosystem, and provides a suite of services to meet the employer's workforce needs. Examples of these services include connecting employers to our ecosystem partners and their talent pipelines, delivering labor market information, placing ecosystem candidates into employment using our Talent Portal, and developing varied types of work-based learning opportunities with our partners through the Talent Bound initiative.

II. **Overview**

EmployIndy currently utilizes a shared instance of Salesforce with the Indy Chamber. When deployed in 2017, EmployIndy was initially focused on improving data collection of Business Partnerships interactions with its various employer partners throughout Marion county. Simultaneously, EmployIndy was migrating its contract management software and selected PactSafe as its vendor given the ability to interface with the Salesforce customer relationship manager. After two years of customization due to unique specifications of EmployIndy, the shared state considerably limits the number of objects necessary to efficiently and accurately perform the needs of the organization specific to relationship management and contracting. Additionally, there are limitations currently around data ownership as changes made are not tracked nor does true data ownership exist.

An ideal solution would allow EmployIndy to integrate relationships, contracts and agreements, and financial records to manage braided and leveraged funds among all programs and initiatives in real time with customized reports and visual representations. Within programs and initiative there are volumes of data that must be synthesized and analyzed to represent the current state of activities, expenditures, outcomes and performance. . We aim to have the ability to manipulate dashboards from an organizational view down to a single variable which can be expanded or contracted to analyze program variables.

III. **Purpose**

The purpose of this Request for Proposals (RFP) is to migrate to Salesforce.org, rectify the limited ability to customize, integrate additional software and tools into EmployIndy's instance, and add functionality and data tracking to deliver real time reports and interactive dashboards. EmployIndy aims to solicit proposals from qualified entities to migrate data currently housed in the shared Salesforce instance to an individually administered Salesforce instance utilizing the Nonprofit Success Pack (NPSP), as well as continue to improve the Salesforce CRM to be more user-friendly and better integrated into daily workflows in order to:

1. Develop efficiencies in relationship management of partner relationships, funded contracts, as well as fiscal and programmatic reporting;
2. Increase visibility into relationships of partners, contracts, budgets/expenditures and programs through dashboards and reporting;

3. Increase capabilities of data collection across the organization specific to management of programs and initiatives, rather than the limited capabilities of relationships and contracts/agreements currently;
4. Integrate the data collection and reporting needs of the entire organization;
5. Streamline communication and partner engagement; and
6. Transition and integrate additional third-party applications to the new instance.

In addition to Salesforce, EmployIndy utilizes a variety of software and tools including excel spreadsheets, Airtable, and various required data systems to manage relationship and partner information, making the management and reporting of information and contact interactions across the organization cumbersome and inefficient. See Attachment C – EmployIndy Systems for a comprehensive list of all software and tools used throughout the organization to manage communication, data, reporting, etc.

Currently, EmployIndy relies on third-party software PactSafe and Financial Edge NXT (a Blackbaud product) for contract management and fiscal processes respectively and will require integration of these products in our future instance. Additionally, EmployIndy currently uses TargetRecruit for its job board and will migrate to the Ascend Indiana Network in late 2020. This platform requires a CRM API and the new Salesforce instance will support this need.

The successful partner for this RFP will:

- Have demonstrated proficiency, experience, and creativity as a developer for Salesforce CRM for nonprofits, specifically the NPSP;
- Present a thoughtful comprehensive plan and set of strategies for developing and deploying the Salesforce CRM including specifications of the build with costs and a timeline;
- Have demonstrated the capability to design and administer the implementation that makes it easy for non-technical EmployIndy staff to use Salesforce proficiently;
- Understand IT needs, specifications, and solutions related to Salesforce;
- Understand cost-efficient solutions; and
- Demonstrate a working style and approach that is compatible with EmployIndy needs for the project and additional support post-implementation, if needed.

a. **Project Introduction**
EmployIndy currently collaborates with the Indy Chamber to share their Salesforce instance with permission to customize various aspects of the CRM to meet our needs. Initially, an implementation partner was brought on to create custom objects, fields and reports in an effort to customize objects for our needs as well as integrating contracting and financial tools without the native capability. A new Salesforce instance would improve integration of these tools with relationship intelligence as the building blocks to robust program and initiative management systems.

The challenges and needs EmployIndy has are multi-faceted. We seek to consolidate programmatic information stored in disparate systems managed separately between departments as well as non-uniform applications or tools and integrate those into the Salesforce CRM. Additionally, we seek to incorporate contractual, fiscal and programmatic data in order to provide complete business overviews and develop custom reports and dashboards that yield data for strategic and actionable insights. The overall goal is for full adoption throughout the organization through staff training and utilization of the new Salesforce instance.

b. Background

Employer Engagement
EmployIndy uses Salesforce to track engagement with employers within a tiered structure and along a continuum that includes participation in various work-based experiences and the facilitation of requests for employers to engage with multiple partner agencies.

Contracts
All contracts, agreements and grant awards are administered and tracked in PactSafe utilizing relationship information retained in Salesforce

Contractual Performance Outcomes
Program and initiative outcomes and outputs are not currently tracked in a single application but within multiple and inconsistent applications and tools. Program participant outcomes are tracked in several federal, state and locally mandated systems which cannot be integrated in Salesforce at the individual participant level but could provide aggregated reports to improve real time program management information.

Event Management
Tracking of events, both internal and external, is done with an Airtable base, Salesforce, or individual Outlook calendars. Filtered displays of events tracked within Airtable are currently linked for public view on workoneindy.com and in the EmployIndy email newsletters.

Accounting
EmployIndy utilizes Financial Edge NXT for accounting and financial management.

Leadership
Leadership are actively communicating with numerous stakeholders about individual programs and initiatives, progress toward strategic goals, and community impact which requires data and information, at a glance, of fiscal and programmatic inputs and outcomes. This is currently accomplished very inefficiently through report generation, analysis, and synthesis from inputs from multiple departments, systems, documents and spreadsheets.

<u>Cross Functional</u>
Individuals interact with contacts and agreements for various reasons depending on their role within the organization. A contact may have multiple types of relationships with EmployIndy, both within and across departments, funding sources, and programs or initiatives. Contracts and agreements can be linked to multiple grants or funding sources and single organizations/contacts may have multiple contracts or agreements.

IV. <u>Scope of Work</u>

EmployIndy is seeking a proposal and solution demonstration, based on the use case attached, from qualified vendors for the transition of current data housed in the shared Salesforce instance to a new instance, utilizing the NPSP, and demonstrating the ability to display intertwined data and information between contracts, contacts (relationships) and fiscal records Furthermore, it is critical to be able to review metrics and outcomes on these relationships via interactive real time dashboards including management information from the granular to the leadership view for various user groups. Technical support and education for using the customized platform and reporting tools, and guidance in application integration, profile and security management, is vital to ensuring a successful transition.

a. Strategic Objectives
- Move data from current (shared) Salesforce instance into an independent Salesforce.org license utilizing the NPSP for cost savings to EmployIndy;
- Align business processes to improve efficiencies related to systems use data reliability;
- Streamline data collection processes in Salesforce to improve data tracking;
- Create holistic displays by partner and the various ways they interact with user groups at EmployIndy; and
- Maximize use of data, including intersections of funding, programs, and relationships, to inform program management dashboards and better inform decision making across the organization and communicate impact across the EmployIndy Ecosystem.

b. Current Challenges
- Limited adoption of Salesforce by users across the organization due to customization constraints of current instance;
- Underdeveloped user profiles and permissions;
- Ability to search, update, and reconcile information is cumbersome and not correctly automated;
- Processes create lag in management reports and include multiple entries across multiple systems;
- Inefficiencies in running reports, tracking and analyzing data to include in a single view the relationship between contractual, financial and programmatic data
- Patchy integration of tools and plug-ins requires manual data entry;

- Inability to track changes in accounts and contacts or execute changes in assignment or management; and
- Insufficient training for staff on the current Salesforce instance.

    c. Deliverables
- Create custom reporting systems and dashboards that are easy to use and seamlessly move between granular and high-level information;
- Create business reports and visualizations/dashboards providing insights into financial, contractual, and programmatic information to suit user group, manager, and leadership needs;
- Built-in workflow features that reduce staff time in system navigation and data entry;
- Provide training sessions for EmployIndy staff by user type with documentation and manuals reinforcing business processes;
- Ability to integrate current third-party software and ensure data from the software is seamlessly incorporated into everyday practices within Salesforce and displays in real-time;
- Migrate approximately 100,000 records across various record types from current shared Salesforce instance to a new instance utilizing NPSP;
- Establish and document data structures and workflows that align with teams' objectives and ensure system flow provides streamlined workflow processes without limiting functionality;
- Identify and establish external data sources that need to be imported into Salesforce either via direct screen entry of data by staff, external upload, or API connections; and
- Create functionality to document a one-to-many activity to accounts or other records.

    d. Expectations
- Rigorous management of project via clearly defined and outlined communication strategy by implementation team using agile development to ensure project deliverables are met;
- Ability to be flexible and adapt based on findings during discovery and as the project progresses;
- Creating systems that evolve with the changing needs of the organization; and
- Consult and finalize details with various teams (user groups) regarding current and future data tracking and need for additional functionality.

V. Specifications
- Local, small and minority-owned businesses are encouraged to respond and shall not be discriminated against during proposal review.
- EmployIndy is an equal opportunity employer. All parties submitting a proposal shall certify the same.
- EmployIndy reserves the right to reject any and all proposals if it is in the best interest of EmployIndy to do so and waive any minor informalities or irregularities in the RFP process. EmployIndy shall be the sole judge of these irregularities.

- EmployIndy will consider non-responsive any submittal for which critical information is omitted, lacking or represents a major deviation from the RFP.
- Proposals received after the due date of February 10, 2020 at 4:00 p.m. ET will be considered non-responsive and will not be reviewed or evaluated.
- EmployIndy reserves the right to negotiate proposed outcomes, budget, and other matters prior to the actual execution of the contract.

a. Contract Type

Contracts executed from this RFP will be paid through cost reimbursement based on the scope of work for negotiated services and outcomes.

b. Technical Qualifications

To be eligible for consideration, individuals or organizations submitting proposals must demonstrate:
  i.   No financial or policy interest in EmployIndy;
  ii. Experienced staff or subcontractors to provide the services described herein or must show the ability to acquire such staff;
  iii. Experience in effectively performing similar types of services in the public or private sector;
  iv. Ability to contract with EmployIndy for the delivery of services in a timely manner for the delivery of these services; and
  v.   Ability to fulfill contract requirements, including the indemnification and insurance requirements.

VI.   Proposal Requirements

a. Proposal Timeline

Beginning Monday, January 27, 2020 the RFP will be available to download from the EmployIndy website: www.employindy.org. If you are unable to access or download the RFP, please contact Sara Phillips at sphillips@employindy.org or (317) 684-7617. Key dates specific to this notification are scheduled as follows:

RFP Issued	Monday, January 27, 2020
Deadline to Submit Questions	Friday, January 31, 2020, 5 pm
Responses to Questions Posted	Monday, February 3, 2020
Proposal Due	Monday, February 10, 2020, 4 pm
Demo Presentations	On or around February 19, 2020

EmployIndy reserves the right to modify this schedule at any time as deemed necessary.

Entities may submit questions to sphillips@employindy.org until Friday, January 31 at 5:00 pm ET. A response to all questions will be available no later than close of

business on Monday, February 3, 2020 and posted at www.employindy.org. If it becomes necessary to revise any part of this RFP, an addendum will also be posted on the EmployIndy website.

b. Proposal Submission

The proposal must be received by EmployIndy no later than 4:00 pm ET on Monday, February 10, 2020. Please submit one proposal with original signature(s) and seven (7) additional copies of that proposal to:

ATTN: Sara Phillips, Manager, Grants & Contracts
EmployIndy
PNC Center
101 W. Washington St., Suite 1200
Indianapolis, IN 46204

An electronic copy of the proposal must also be received by EmployIndy no later than 4:00 pm ET. Please send documents to sphillips@employindy.org.

Both physical and electronic versions of the proposal must be submitted on time to be considered compliant.

c. Required Proposal Outline and Components

Each respondent is expected to submit a proposal in a format suitable for ease of review. To maintain comparability of proposals, respondents must follow the outline below including all section and sub-section headings exactly as they appear, including all proposal details and within the maximum page limits for each section as specified below.

1. Proposal Cover Sheet:
The Proposal Cover Sheet should not exceed a single (1) page and must include:
- The title of the proposal;
- The respondent's organization name, address, phone number, and web address;
- The name of the person authorized to negotiate contracts and make decisions for the organization their direct phone number and email address;
- The total funds request; and
- The authorized signature and submittal date.

2. Organizational Capabilities and Qualifications
A description of the organization, staff expertise, capacity and qualifications, including details of successful projects that are similar in nature and scope. At a minimum this should include:
- A narrative describing the organizational capabilities and qualifications;
- Resumes, job descriptions and/or profiles for the staff to be assigned to this project; and

- A list of at least four (4) project descriptions and for references similar services.

3. Project Plan and Demo

The project plan will consist of an estimated timeline and approach to implement the scope of work with deliverables outlined. The demonstration will consist of a solution to display blended data and relationships between contacts, financial records and contracts from the leadership-level down to the granular view. Within the demonstration, workflow visualizations may be a prototype.

4. Budget and Budget Narrative

The respondent should provide an estimated budget, including breakdown of costs, responsible parties, and hours associated with the project.

5. Additional Questions

- What is your organization's experience working with nonprofits seeking a comprehensive Salesforce solution?
- Does your organization have experience working with the following apps/programs; Financial Edge NXT, TargetRecruit, and/or PactSafe?
- In your experience, what are the biggest challenges specific to these types of projects? How can we avoid or address these potential challenges?
- What are the roles, responsibilities, and expectations for your organization and for our organization during the implementation process?

VII. **Proposal Evaluation and Provider Selection Criteria**

All bidders are advised that each proposal will be evaluated based on responsiveness to this RFP. Proposals will be reviewed for completeness, clarity and adherence to stated requirements. Proposals will be rated based on the selection criteria and in rank order from the highest to lowest. Selections for contract negotiations will normally be made in rank order. However, to ensure availability of quality services, EmployIndy reserves the right to select lower ranked proposals when warranted. Such selection of proposals shall be made at the sole discretion of EmployIndy.

Proposals may score a maximum of 70 points and demos (if invited to present) will be worth 30 points. The proposals and demos will be evaluated as follows:

Evaluation Factors	Maximum Points
Cost and timeline	20
Solution innovation and implementation	20
Project management approach	15

Experience working with the Nonprofit Success Pack, foundationConnect, or products similar in scope and functionality, and creating nonprofit solutions	15
Total Points	**70**
Visual demonstration or prototype (if invited to present)	30