Draft Request for Proposal: Business Process Analysis and Database Redesign

Submitted by: Leadership Baltimore County

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Timeline

November 5, 2021:	Proposal released
November 17, 2021	Questions due to Mary Kay Page
November 22, 2021:	Deadline to notify Mary Kay Page of intent to apply
November 22, 2021:	Responses to questions provided to all expected candidates.
December 14, 2021 12pm:	Proposals due
January 26, 2021:	LBC provides decision notification

About Us

Leadership Baltimore County (LBC) is a community leadership program with a mission to bring high achievers with diverse perspectives together to heighten their civic awareness, enhance their organizational effectiveness and become a driving force for positive change in their workplace and Baltimore County as a whole.

These informed leaders have the inspiration and collaborative tools to improve the Baltimore County community/region with innovative solutions. Every year, we graduate a diverse group of civic leaders to engage with the Baltimore County community. Areas of focus include public safety, education, healthcare, economic development and much more. Together, we tackle difficult issues and create positive change in our community.

Project Summary

LBC is seeking assistance to increase organizational efficiency and effectiveness by improving existing processes, procedures, and technology. This includes redesign of its Salesforce database based on issues identified by staff and in a full review with the selected partner.

Deliverables

- Perform a complete analysis of LBC's business processes
- Provide recommendations for streamlining and automating business processes
- Map current and future states of data flow
- Describe changes needed to reach future state of data flow

- Implement recommended technology changes.
- Provide new technology recommendations including cost and priority. If new technology is recommended beyond LBC's current level, the consultant will develop a process to use current technology until LBC is able to purchase new technology.

Project Goals

As a result of this engagement, LBC will be able to efficiently:

- Rely on and build on Salesforce as the central source of truth in LBC data
- Keep updated contact information through two-way syncing of Salesforce and Mailchimp
- To the extent possible, automate and fully document the entire cycle of outreach to prospects, sponsoring organizations, alumni, volunteers, and donors from first contact to closing to ongoing cultivation and communications
- Report to Board of Directors on recruitment, alumni engagement, volunteer and fund development progress*
- Report on what outreach mechanisms are leading to nominations and participants in the class, such as social media, staff, newsletter, etc.
- Monitor board members' completion of obligations, expertise, demographics, and terms*
- Manage on-boarding of new class members*
- Track committee membership*
- Track alumni engagement through event attendance, membership renewal and volunteer engagement*

  *(See also Appendix A, List of Reports. List includes known reporting needs, subject to change.)

Existing Resources

Human Resources: LBC has 2.5 FTE. The President & CEO is responsible for overall management, fund raising, program management, human resources management, and financial management. The Assistant Director is responsible for marketing and communications, business development, and supporting program and financial management. The Administrative Specialist is responsible for data management, event logistics, bookkeeping, and other administrative support.

LBC also relies on volunteers to support its mission, including its board of directors, several working committees, and ad-hoc volunteers.

The only business processes that are outsourced are payroll processing, tax reporting and occasional technical support.

Technology Resources: LBC holds several paid and free software subscriptions. See Appendix B Data Map for details.

Website: LBC's website is built using WordPress with supporting plugins.

Calendars: LBC uses a shared MS Office Outlook calendar and all staff have access to each other's individual calendars.

Database: Salesforce houses all contact information and actions related to contacts. We have the Nonprofit Starter Pack. We also have subscriptions to two applications: Apsona and DupeEliminator. Staff members' familiarity with Salesforce ranges from beginner to intermediate.

Email: LBC uses Mailchimp to send email blasts to our network. Mailchimp is partially synced with the website and Salesforce

Written Procedures: LBC has been building up its written procedures over the last 5 years. There is not a complete SOP.

Known Database Needs

In addition to any recommendations provided as a part of this project, LBC needs the following :

- Prepare LBC staff for effective learning and testing by:
    - Refreshing LBC Sandbox environment
    - Helping LBC staff use it to practice Trailhead skills and test changes
    - Establishing a work flow for the consultant to make changes and to move from Sandbox to production.
- Conclude automation of membership renewal thank you process. A web developer is currently working on getting memberships to flow from website into Salesforce. Make sure the thank you letter for membership renewal is automated.
- Set up Salesforce engagement plans to automate outreach to prospects.
- Review LBC process for tracking and contacting heads of organizations and primary contacts, make recommendations for improvements.
- Set up dashboard to reflect daily key metrics and quarterly board report, including current number of prospects and organizations in the recruitment pool, current number of participants enrolled in the next class, total funds raised, etc..
- Enable historical tracking of employment information of all contacts.
- Add ticket revenue tracking, custom response types, and planning committee names to campaigns/event.
- Sync Event Espresso registration with campaign members in salesforce.
- Develop process to import or sync dietary needs and emergency contacts into salesforce contacts from the application form or survey monkey responses.

- Develop system for collecting and tracking class members' civic engagement plans, such as a form that syncs to salesforce.
- Consult on if/how to sync Salesforce with QuickBooks. Implement if advisable.

Requirements

Skills, Knowledge, and Experience Requirements

- Analytical
    a. Proven experience and skills in business analysis
    b. Proven and successful experience creating and implementing a work plan to increase organizational efficiencies and effectiveness
- Technical
    a. Registered partner with Salesforce and/or adequate certifications to demonstrate expertise
    b. Current knowledge of available technology
    c. Experience customizing a salesforce instance for membership-based organizations and/or nonprofit education programs using NPSP
    d. Proven and successful experience creating a work plan and outlining software structure and functions based on the organization's needs
- Training
    a. Ability to produce written standard operating procedures and data entry protocol
    b. Ability to communicate with and train non-technical staff on new procedures
- Other
    a. Extensive knowledge of nonprofit management
    b. A clear approach to project management

Proposal Requirements

1. Description of the individual and/or the firm's qualifications, including:
    a. Relevant overall education and certifications and Salesforce specific credentials
    b. Years of experience
    c. Examples of similar projects
2. Detailed description of your approach to managing this project.
3. Detailed description of what you will include in progress reports and when you will provide them
4. Fixed price, including hourly rate the price is based upon.
5. Cost broken down by phases, including labor and recommended software/hardware purchases
6. Three relevant references

Appendix A

Fields and/or Work Flows to be Created	Report Needs to be Created or Refined	Work Process Category	Goal	Description
yes	created	Outreach	Understand how many touches is takes to convert a prospect to a participant	Report on number of touches for each participant in each class; plus average, high and low for each class
no	created	Membership	Understand who renews and what campaign drove them to renew	Report on number of memberships in a given program year and the campaign(s) attributed to their renewal
yes	created	Membership	Understand who is most likely to renew	Report on number of members in a given year who renewed the year before. Also report on the percentage of years they have renewed (In other words, if someone graduated 2 years ago and joined both years, they renewed 100% of the time.)
yes	created	Events	Demonstrate event attendance	Show number of registrants and number of people and names of who actually attended any given event; and also all events in any given fiscal year and ticket revenue raised
yes	revised	Board Management	Demonstrate board participation	Report on if/when of obligations met. Includes recruited class member, made contribution, renewed membership, secured an event sponsor, attended board meetings, submitted current year COI, submitted current year pledge form
yes	created	Board Management	Track board terms	Report on board terms
no	created	Volunteer Management	View committee lists	Report on active members of each LBC committee, includes name, company, phone, email
no	revised	Board Management	Demonstrate board diversity	Report on race, gender, industry for board members
yes	created	Fund Development	Track fundraising progress against goals	Report on total raised through memberships, event sponsorships, retreat sponsorships, partnerships, board contributions, scholarship contributions

yes	created	Volunteer Management	Track ratings of retreat speakers	Report on class member ratings of retreat speakers
no	created	Volunteer Management	Understand relationship between membership payments and event attendance	Report on number of event attendees who are active members, and number of members who do not attend events
yes	created	Outreach	Track application progress	Report on what each applicant has completed in the process. Includes applied, attended info session, submitted release and agreement, submitted photo, submitted payment, submitted ride along form, submitted county and state districts
yes	created	Volunteer Management	Understand level of alumni engagement	Show number of returning and new committee members, coaches, board members, and other volunteers
no	revised	Outreach	Demonstrate potential for recruitment by understanding the candidate pool	Report on number of individual prospects and likelihood of conversion, number of corporate prospects and likelihood of conversion, number of nominations received
no	created	outreach	Demonstrate which outreach efforts are yielding nominations and participants	Show the number of nominees that applied because of a board member, staff member, social media or newsletter. Also show the number of participants that enrolled because of a board member, staff member, etc.

Appendix B


LBC Website
Forms
Event Espresso
Directory
Volunteer Forms
Application Forms
Donation Forms
Membership Payment
Refferal Forms
Newsletter sign ups
Ticket Purchases
Membership Status
Profile Information
Quick Books
Membership Payments
Event Ticket Purchases
Sponsorship Payments
Corporate Partnerships
Paypal
Salesforce
Mailchimp
Leads
Campaigns
Revenue
Contacts
Memberships
Event tickets
Sponsorship payments
Corporate Partnerships
Profile Information
Membership Information
Activities
Outlook
Emails Sent
Emails Recieved (Info Box)
Key
Dotted Lines: Data manually entered