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**Request for Proposal**

Technology Assessment and Recommendations

for a Rural Community Assistance Corporation Data Strategy

**11/03/2022**

*RFP # ES-2022.01*

# **Purpose**

The Rural Community Assistance Corporation (RCAC) recognizes the increasing importance of demonstrating impact in the communities it serves. The organization also realizes that its current data systems and processes are becoming harder and more time consuming for staff to manage. RCAC, therefore, seeks to retain a consultant or firm to undertake a review of existing systems and processes to determine and recommend the best solution to achieve its goal of accurate data that is easily available and integrated across the organization.

RCAC envisions two phases: this overview, and a second project to implement a data solution. The consultant selected for this assessment is not precluded from applying for the second phase. This Phase I, outlined below, is expected to last no longer than 3 months.

# **Background**

Since 1978, RCAC has been a critical partner to low-income rural and Indigenous communities in 13 western states, including Alaska and Hawaii. Over the last 44 years, the organization has grown significantly, increasing its visibility and relevance and expanded its scope of services. From an initial staff of eight to our current team of about 200, RCAC’s growth trajectory has been particularly intense over the past three years with the addition of 101 new staff.

Based in West Sacramento, CA, RCAC provides technical assistance, training and coaching, financing, and advocacy services in 13 western states and across three areas of need:

* Environmental infrastructure,
* Housing services, and
* Rural economic development

RCAC is also a certified Community Development Financing Institution (CDFI).

RCAC’s services provide a foundation for the health and wellness of the rural populations it serves. Its programming leads to safe water and wastewater, affordable housing, job creation and retention, new business incubation, and access to capital for essential community facilities - all of which contribute to community health and well-being.

RCAC’s current data collection environment is no longer adequate to serve the organization. Issues include but are not limited to:

1. Data is primarily stored in Word/PDF and Excel. RCAC does not currently use a CRM or data warehouse. This results in many manual processes that could be automated with the proper technology.
2. Due to funder requirements, programs within RCAC departments have different data collection methods, source databases, and use different software. As a result, there is no standardized, organization-wide quality assurance or control pr cross-departmental data is not accessible. For example, staff in the Housing Department are not able to view data in the Environmental Department because processes for data storage are different and not understood across departments.
3. Lack of uniform and standardized quality assurance and control

# **Eligibility**

RCAC requires a consultant/firm with demonstrated experience in:

* defining business and user needs and goals,
* providing technology strategies and process improvements to non-profit organizations, and
* implementation of new technology and data workflows.

# **Project Overview/Technical Scope**

* + **Task 1 – Project Plan**: Develop and submit a Workplan that outlines how you plan to assess RCAC’s data environment. After the initial kick off meeting, develop and submit detailed plan that includes RCAC’s participation and proposed timing.
	+ **Task 2 – Stakeholder Needs Assessment**: Review and understand RCAC’s business and user needs. Users include Technical Assistance Providers (TAPs), who enter data, Grants and Contracts staff, who compile data for grant reporting, and program managers, grant writers, and senior staff, who use the data to communicate impact and make decisions about future directions for the organization. It is expected the consultant/firm will undertake multiple interviews with selected RCAC staff to understand:
	+ What data collection needs exist
	+ User perspective of challenges with current data infrastructure and processes
	+ User priorities for improved data collection
	+ **Task 3 – Current Data Workflows Assessment**: Review and understand RCAC’s current data collection, data storage, reporting processes, and constraints to current systems. This includes board reporting, funder reporting, and internal metric measurement (KPIs). RCAC has compiled information that should be reviewed by the consultant/firm. This includes but is not limited to three data inventories (to see where data lives now), a data dictionary, a list of foundational definitions, use cases, requirements, a document on data management and principles, a possible universal intake form, and 2023 KPI data needs.
	+ **Task 4 – Software Options**: This task will identify the technologies we should begin to implement in Phase 2. This includes, but is not limited to:
		- Recommended technologies to invest in *and why*
		- Pros and cons of different technology investment scenarios (including cost)
	+ Recommended best practices for using new technologies
* **Task 5 – Potential Implementation Timeline for Phase II:** Produce an action-oriented plan that outlines a roadmap for implementing the technologies recommended in Task 4. The roadmap can include potential or recommended:
	+ Order/phases of implementation
	+ Timeline with interim milestones and KPIs
	+ Internal individuals responsible for implementing part or all of the plan and, if applicable, external partners who can also support implementation
	+ Potential additions to RCAC staff required for a successful implementation, and how they fit in the organizational chart to support new technologies.
	+ Potential barriers to the implementation of new technology
	+ **Task 6 – Presentation of Findings**: Present written recommendations to senior leadership.

# **Ownership**

All intellectual property will become the property of RCAC. All data remains the sole property of RCAC. The individual or firm shall further agree to keep information related to any and all contracts with RCAC in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with RCAC.

To evaluate the ability of the individual or firm to meet RCAC’s goals, please include the following in your proposal. Proposals should not exceed 5 pages.

# **Proposal Requirements**

* **Organization Description:** Brief summary of your firm and expertise in technology strategy planning, data modeling, data warehousing, CRMs, and system integration.
* **Methodology:** Please explain the process you will use for recommending software or technology solutions, including what you expect from RCAC.
* **Experience:** Please provide two examples of data strategy projects that are similar to the kinds of tasks we are proposing for our scope. Firms with CDFI experience; please use a CDFI project as one example.
* **Pricing**: Please provide your hourly rates and total cost quote for this work.
* **References**: Provide two client references that can speak to your experience in conducting projects of similar size/scope. Information regarding each reference should include the individual’s name, organization, telephone number and email address.
* **Project team:** Who from your team will play what role on the project and contact information.

# **Process for Consultant Selection and Timing**

Submissions are due by 5:00pm Pacific Time, December 5th, 2022. Each firm’s proposal submission authorizes RCAC to contact stated references. Please attach all documents and send them in PDF format electronically to Darcy Bostic at dbostic@rcac.org. Hard copies will not be accepted.

Please send any inquiries to Darcy Bostic, Dbostic@rcac.org before the closing submission date. All questions and responses will be posted to our website within 2 business days.

# **Right to Reject**

RCAC reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

# **Confidentiality**

If the applicant deems any material submitted to be proprietary or confidential, that must be indicated in the relevant section(s) of the response.

# **Criteria for Selection**

All proposals will be evaluated based on the following key criteria:

* Performance capability—demonstrated ability to provide the depth and breadth of experience, skills, knowledge, and creativity required to do this work.
* Understanding of, and commitment to, RCAC’s mission and vision
* Demonstrated experience with similar-sized organizations (not just non-profits). RCAC has a team of about 200 and an annual operational budget of around $38 million.
* Completeness and quality of response, including clear approach.
* Proposed pricing.
* References.
* Preference will be given to firms certified as Minority and Women Business Enterprise (M/WBE) Service-Disabled Veteran (SDV) and Emerging Small Business (ESB).
* Preference will be given to firms with CDFI experience

RCAC retains the right to reject any and all proposals without explanation. RCAC further may request interviews with applicants to clarify or discuss modifications to the scope.

# **Notification of Selection and Timeline**

It is expected that a recipient will be selected within two weeks of the closing submission date, although this timeline is subject to change. RCAC reserves the right to cancel this RFP at any time.  Upon conclusion of negotiations with the successful recipient, all applicants submitting responses to this RFP will be informed that a selection has been made.

Thank you for your response.