REQUEST FOR PROPOSAL

CRM Platform Selection

August 1st, 2023
Request for Information Background

This Request for Information (RFI) is hereby issued to you and other potential suppliers by the Rural Community Assistance Corporation (RCAC) to solicit information for evaluating an CRM Platform. This RFI and associated appendices contain documentation on key business requirements which are desired to be included in the solution. We recognize that the organization has many needs and there may not be one solution capable of addressing all of them. To be eligible for further consideration, vendors must respond using the supplied response forms included with this RFI as an Excel Workbook.

Following our review of RFI responses, product demonstrations will be scheduled with a short list of vendors to evaluate the functionality and usability of their solution. Further conversations may also be scheduled with each vendor to further clarify the RFI or obtain assurance of vendor qualifications.

RFI Schedule of Activities

The time frame for this RFI and the vendor selection process is as follows:

<table>
<thead>
<tr>
<th>RFI Activity</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFI Distributed to Vendors</td>
<td>08/03/2023</td>
</tr>
<tr>
<td>RFI Response Deadline</td>
<td>08/18/2023</td>
</tr>
<tr>
<td>Notification to Vendors for Demo Request</td>
<td>08/25/2023</td>
</tr>
<tr>
<td>Product Demonstrations for Select Vendors</td>
<td>Week of 09/04/2023</td>
</tr>
</tbody>
</table>

Acknowledgement & Questions regarding this RFI

RCAC has engaged ATX Advisory Services to manage this software selection and has requested that all correspondence related to this RFI be made directly with ATX Advisory Services.

We request that all vendors acknowledge receipt and their acceptance to participate in the evaluation on or before 08/14/2023.

We encourage you to submit questions and requests for clarification regarding this request before submitting a final response. Please submit questions in writing on or before 08/14/2023.

Participation acknowledgment and questions should be sent to Joe Martin (joe.martin@atxadvisory.com)
RFI Response Requirements

If you are interested in having your solution considered, your response must consist of a completed response document. This response submission must be returned by responding to the items in Vendor Response Document and must be returned in the same format (MS Excel – not PDF). Additional schedules may be included, but the population of all tabs in the Vendor Response (Excel Document) is mandatory. Please respond to the items in the Appendix in as much detail as possible for us to understand the capabilities of your product.

Send your complete response to Joe Martin (joe.martin@atxadvisory.com). All responses must be received by 08/18/2023.

The response document contains 3 tabs which should be populated as follows:

<table>
<thead>
<tr>
<th>Response Section</th>
<th>Information Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vendor &amp; Solution Overview</strong></td>
<td>Use this tab to provide information about your company, implementation &amp; support model and the architecture of the proposed solution. Populate the Vendor Response column (Column D) with an appropriate response for the question.</td>
</tr>
<tr>
<td><strong>Detailed Requirements</strong></td>
<td><strong>Within each area indicate your solutions ability to meet the stated requirements. Column F is required</strong> and should be populated as follows:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Functionality</td>
<td>This functionality is standard in the product and easily configured in the product to support this requirement.</td>
</tr>
<tr>
<td>Configuration</td>
<td>This requirement could potentially be met by using product / form configuration tools provided. Provide detail as appropriate.</td>
</tr>
<tr>
<td>Customization</td>
<td>This requirement could be met via a customization to the product. Specify in column G an indication of magnitude of the customization (Small, Medium, or Large).</td>
</tr>
<tr>
<td>Integration</td>
<td>An integration would need to be configured or developed to meet this requirement. If an integration is required, please provide details as to your experience in building this type of integration.</td>
</tr>
<tr>
<td>Third-Party Application</td>
<td>This requirement could be met by a third-party solution. If selecting this option, indicate in column G the proposed solution and whether it is integrated with your product.</td>
</tr>
<tr>
<td>Not Available</td>
<td>This requirement cannot be met with the solution. We expect that most vendors will have some gaps in functionality, so please indicate which requirements are likely not a good fit for your product.</td>
</tr>
</tbody>
</table>

Additional information about the requirement may be added in Column G.
Company Background

Rural Community Assistance Corporation (RCAC) is a 501(c)(3) nonprofit organization that operates in 13 western states and Pacific islands and serves Indigenous and rural communities through training, technical and financial assistance and advocacy. With over 200 staff and having doubled in size over the last three years, RCAC provides a range of services that center around four primary program areas, including Economic Development (BRE), Environmental Programs, Housing, and Loan Fund.

RCAC’s economic development arm provides capacity building, cohort training, and business coaching to small businesses seeking assistance through programs such as Smart Growth and Entrepreneurial Ecosystems.

Through their Community and Environmental Services, RCAC provides a diverse range of services, including: providing training and workshops to contractors and operators to maintain licensure, board and financial training to organizations, well water testing and inspections, pass-thru funding to other non-profit organizations, as well as other technical services. RCAC’s Community and Economic Development services help communities create a vision, set goals and implement an action plan for community development projects.

RCAC’s Housing programs provide a wide range of services including: technical assistance and training to grantees, capacity building and housing development services, USDA Section 502 lending application reviews, and disaster recovery services through several programs. These programs include: Self-Help Housing, Development Solutions, Housing Counseling, Home Ownership, and Disaster Recovery services.

RCAC’s Loan fund provides a wide variety of loans, from Affordable Housing to Small Business, Community Facility, and Environmental Infrastructure loans. Their loan products are often complex, requiring draws, modifications, and segmentation of participation loans.

Project Overview

The varied nature of RCAC’s operations presents several challenges from a systems perspective. Additionally, the organization has grown over the years and new technologies have been introduced to address incremental needs. It is now time to implement an organization wide CRM solution to lay the foundation for a more integrated set of solutions to improve fundraising, marketing and communications, task management, data collection and management, and generally visibility organization wide.
The current technology environment includes the following core solutions:

- **UnaNet** is the core financial platform of the organization. UnaNet is used for time entry, project tracking, invoicing, PO’s, and financial accounting (including RCAC’s general ledger).
- **SharePoint** is used to varying degrees across the organization. Aside from being used for document management, the organization has developed custom SharePoint sites internally and with 3rd party vendors. They are all used in varying degrees to collect program information, manage tasks, and report out information. The organization has built applications which they refer to as **Event Tracker** and the **Contract Management Database** using SharePoint as a way to create and execute events and to better manage grants and projects across the organization (respectively).
- **Nortridge** is used by the organization to manage its loan portfolio
- **LAPS** is a custom-built loan origination software system developed internally

RCAC as an organization has many points of entry into its varied programs. The organization primary objectives in a CRM solution are to:

1. **Account and Contact Management:**
   RCAC staff engage with a wide range of partners and clients and do not have a central place through which to route communication. **There is a need to identify and track who at RCAC is talking to whom and when.** This includes funders, requests from communities/potential partners, as well as communication with existing partners. Often one department/program may be communicating with a party that another department/program is working with, but there is a lack of visibility to know that information. RCAC needs a repository for this information which allows for proper segmentation of those groups and facilitates communication. The system should also allow for referrals to be made from one part of the organization to another.

2. **Programs:**
   RCAC executes a wide variety of programs, all of which require the capture of some technical assistance data and the ability to report on that information. Currently that information may reside in SharePoint, offline trackers, or a multitude of 3rd party portals which they are required to report into. RCAC wants to standardize and centralize their location of TA data entry through their CRM to improve visibility. This includes developing standardized forms for staff to fill out as well as the ability to build surveys for participants to complete.

   Also, while the organization utilizes existing tools like Unanet, Event Tracker, and the Contract Management database for high level project management, lower-level project management is performed in a variety of ways or often offline. Some departments use SharePoint features while others may utilize excel or other offline tools. There is a need for a system to track deliverables for various grants and their status/completion as well as to track which deliverables are assigned to which RCAC staff.
3. **Fundraising:**
RCAC’s fundraising efforts are largely manual currently, relying on Excel and Word documents to track funds (Fund Development Chart) as well as communications. There is a need to move these processes into a CRM so they can tag and track opportunities, manage a pipeline, track funds received and manage tasks both related to donor cultivation and award compliance. It is also important that funding information can be linked to lending opportunities to track and understand available funding sources and the pipeline of their deployment via the Loan Fund.

4. **Lending:**
RCAC requires a new platform to facilitate loan origination. This includes the creation of intake applications (may have different applications for different loans) and having those individuals reside in the larger account and contacts environment for visibility. A pipeline tool is required for not just active deals, but probable deals as well, and all these deals need to be able to be associated with the funding sources that Fund Development identifies to manage portfolio balances. There should be an internal workflow to manage the stages of originations and underwriting as well as an external workflow where clients can see the progress of their applications. Ultimately this must sync to their loan servicing software.

5. **Reporting:**
While RCAC may eventually utilize a data warehouse and BI tool to help improve reporting, data captured across programs, functional areas, and lending must be able to be aggregated as well as segmented for data bound time reporting. They require the development of dashboards for both managerial oversight as well as for more formal and external reporting requirements. It is also important that the system can accommodate demographic and other impact related data, with that data be able to be analyzed by common dimensions (geography, income, etc.) In addition to aggregate reporting, there is also a need for more “drill-down” reporting to access important details.

6. **General:**
RCAC does much of its work in the field and as such desires a system which can allow for mobile data entry and the geo-tagging of that entry for reporting purposes. Because of the size of the organization and the rate at which it is growing, the platform must also be scalable and adaptable for the inevitable creation of new programs or products. Also because of the sensitive information it may contain, the system must have MFA options available and the ability to segment data access based on the need of individuals to access that data.

7. **Client Portal:**
RCAC would like to see the CRM’s capability in setting up client portals to both assist communication and data sharing, as well as opportunities to streamline processes to more easily capture communication.

**By the Numbers:**
- Organization
• Staff of over 200 people doubled over last three years
  • Community and Environmental Services
    o Building Rural Economies team assisted communities with 103 economic development projects in FY22.
    o The Environmental team conducted over 350 trainings with 12,000 attendees in FY2022.
    o 972 communities were assisted with environmental projects in FY2022 as well.
  • Housing
    o Network grantees built over 50,000 houses nationwide in 50+ years
    o 435 homes built by network annually.
    o 46 active Self-Help grantees (network)
    o 20 Active Development Solution clients
    o 18 Housing Counseling sub-grantees
    o Review 200-300 502 Lending loans annually
  • Lending:
    o 122 loan applications totally $68 million in 2022
    o 368 active loans in a $133 million portfolio (including 60 investor loans)