The Indiana Afterschool Network (IAN) is excited to announce Requests for Proposals (RFPs) to develop, build, and implement our Salesforce CRM solution.

IAN Background
IAN’s mission is to advance opportunities for learning beyond the school day so that all Indiana youth can grow into healthy, thriving adults. IAN serves over 1,000 afterschool programs across Indiana, providing them with resources, standards, and training to improve the quality of their programming. We aim to set the bar on what it means to be a great afterschool provider, and we strive to help programs reach it – because better program quality ultimately means better outcomes for kids.

Project Overview
The Indiana Afterschool Network is seeking to identify a qualified contractor to provide design and build services for the implementation of an integrated and unified Salesforce solution for customer and data management across the organization. IAN is looking to rebuild a new instance of Salesforce from the ground up to meet its needs for data consistency, object-relationship structure, key efficiencies, and cross-integration with third party programs. IAN had previously utilized an instance of Salesforce that has been shut down, and will require leadership in cleaning up existing data for data migration, and establishing new data standards to ensure sustainable data integrity for the organization.
IAN’s Salesforce implementation has been prioritized into four phases. **This RFP is for the development and implementation of Phase 1 only, and IAN will consider Phase 1 partners to be invited to lead Phases 2 through 4.**

- Phase 1: Develop new instance of Salesforce for Quality and Engagement team data integration.
- Phase 2: Marketing Automation
- Phase 3: Systems Integration
- Phase 4: Advocacy & Development

In Phase 1 of the project, our selected partner will lead the development and implementation of a new instance of Salesforce that meets the business needs of our Quality and Engagement teams. Those requirements include:

- The ability to search for and identify all related records for organizations, programs, and sites
- The ability to sort programs by type, size, geography, content, quality level, or other areas of need
- The ability to compile all inbound messages regardless of source in a single queue that allows for collaboration and assignment among team members
- The utilization of message templates to send correspondence through the Salesforce platform
- The ability to log activities and notes attached to specific records
- Work queues that will prioritize qualified leads for cold calls, while other work queues organize open tickets and to-dos for follow-up
- The ability to associate a contact or program with an opportunity and assign it a stage on an opportunity workflow
- The ability to report on key metrics and quality outcomes overtime
- Cross-integration with our platform, MyIAN

**Scope of Project**

The scope of this project is to:

- Understand the needs of IAN’s data collection, integrity, and usage through an intensive Discovery Phase.
- Lead IAN’s efforts in cleaning our existing data for data migration into our new instance of Salesforce.
- Lead IAN through establishing data standards for sustainable longevity in Salesforce.
- Provide training for IAN employees on the use of the new instance of Salesforce.
- Lead IAN through the development, build, and implementation of Phase 1 of our new Salesforce instance.
Deliverables
At the completion of this project IAN will receive

- An implemented Salesforce instance that is fully integrated with IAN’s quality and engagement data and the required platforms, such as my IAN.
- Data migration of current existing provider data, cleaned and modified to be integrated into the new instance of Salesforce.
- Detailed mapped out processes for effective efficiency in the use of the new instance of Salesforce.
- Trained employees who are prepared to effectively utilize the new instance of Salesforce.

Project Timeline
- Please provide a proposed project timeline, including proposed Phase 1 project kick-off and end date, for meeting the project’s objectives.

Budget
- Please provide the budget scope for meeting the above objectives and scope of the project.

Summary of Desired Qualifications
- 5+ years experience working with non-profits’ use of Salesforce; preference for experience with the Salesforce Non-Profit Success Pack
- Experience designing multi-level data structures and managing data clean-up and migration
- Experience building bi-directional data integrations between Salesforce and 3rd party application outside of the Salesforce AppExchange
- Experience with Salesforce Marketing Cloud and Pardot
- Experience implementing Salesforce Communities
- Strong organizational and time management skills
- Strong interpersonal and leadership skills
- Must demonstrate ability to work in and promote an inclusive environment that reflects the broad diversity and backgrounds represented by our providers, partners, and employees in which every individual feels respected and valued
Submission Requirements

- One PDF document, presenting the following requirements in whatever format you think is most clear and compelling:
  - Proposal contact name, email, and phone
  - Qualifications, including relevant knowledge and experience that illustrate how you have been successful with a project of similar scope and scale, and relevant work samples or overviews of similar projects
  - Plan of work to address the scope of this project and provide the deliverables listed above
  - Expected logistical or methodological challenges, and how they will be addressed or minimized to achieved project goals
  - Proposed project timeline
  - Proposed budget scope

- Submissions should not be longer than 10 pages.
- Please do not include generic marketing materials for your service.
- Submissions should be submitted to IAN@indiana afterschool.org by August 18, 2023 (midnight Eastern Time).

Non-Discrimination Statement
IAN uses an open Request for Proposal (RFP) system when seeking to contract with partnering organizations. IAN does not and shall not discriminate on the basis of race, color, creed, ancestry, national origin, citizenship, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation (including actual or perceived heterosexuality, homosexuality, bisexuality, and asexuality), marital status, religion, age, disability, genetic information, service in the military, familial status, or any other characteristic protected by applicable federal, state, or local laws and ordinances.

Questions
- Questions about the project or the proposal should be addressed to Kaya Dorsch (Director of Strategic Initiatives) at IAN@indiana afterschool.org.
- Questions sent by August 4th will be included in the Informational Session as Frequently Asked Questions.
Informational Session

- IAN will be hosting an informational webinar session to walkthrough the requirements and needs for our Salesforce CRM implementation, in which frequently asked questions will be answered. A recording will be provided of the informational session.
- August 8, 2023, at 11 am (EST)
- ZOOM Registration Link:
  - [https://us02web.zoom.us/meeting/register/tZwoc-GorzoiE9SEjUe3E0-fZArExJurrHaX](https://us02web.zoom.us/meeting/register/tZwoc-GorzoiE9SEjUe3E0-fZArExJurrHaX)

RFP Timeline

- RFP Launch – July 20th
- Questions for the Informational Session Due by August 4th
- Informational Session held August 8th, 11 am (EST)
- RFP due by August 18th
- Interviews will be held with selected finalists – August 28th – September 8th

Contact Email
IAN@indianafterschool.org

IAN Info

- Website: [www.indianafterschool.org](http://www.indianafterschool.org)
- Facebook: [www.facebook.com/INafterschool](http://www.facebook.com/INafterschool)
- Twitter: [twitter.com/Iafterschool](http://twitter.com/Iafterschool)