

# **KIPP Foundation Regional Interaction Tracking CRM Platform**

**NOVEMBER 2024**

## Summary

The KIPP Foundation is providing this information to aid in the vendor selection process for a new CRM system. We are searching for a vendor to collaborate with us on the development and implementation of a new technical system that will allow KIPP Foundation staff to track:

- Key information regarding interactions with KIPP Regional staff members
- Key contact information for KIPP Regional staff members

We also seek partnership on the integration of this new CRM with other existing systems (Data Warehouse, other Salesforce instances, HubSpot, etc.).

## Company Information

KIPP Public Schools is a national network of public charter schools that prepares students with the skills and confidence to create the future they want for themselves, their communities, and us all. The KIPP Public Schools network is made up of 278 K-12 schools, 28 regional support organizations, and the nonprofit KIPP Foundation. The KIPP Foundation sets strategy, defines and shares best practices, and ensures alignment and accountability for KIPP regions across the United States.

## The Problem We Are Trying to Solve

Historically, the KIPP Foundation has had difficulty knowing and efficiently tracking key information about regional staff. Certain information is stored within our official data systems, but other information is maintained within spreadsheets, distribution lists, etc. by members of our various KIPP Foundation programmatic teams.

Recently, KIPP began focusing on alignment across our KIPP network and with that, the need to standardize and streamline the process of knowing and keeping up to date key information regarding regions and regional staff has risen as a priority. This includes the need to track:

- Regional staff role and contact information
- Details of Regional interactions, and their associated next steps

Earlier this year, we embarked on a project to implement a procedural and technical solution that will allow the KIPP Foundation staff to track Regional role information and regional interaction data. We have aligned on utilizing a Salesforce system for this effort and are now seeking to enlist a Salesforce consultant/implementation partner to complete this work.

## Vendor Selection Criteria

We are seeking a vendor with experience working with Salesforce design and implementation.

We are looking for companies that have:

- Experience working with educational institutions and/or nonprofit clients, specifically those that:
  - Are large in size
  - Have a distributed model with separate entities – i.e., KIPP Foundation, 28 KIPP Regions, 278 schools
- Many years of expertise
- Flexibility of offerings
- Mission alignment to KIPP’s mission
- A proven commitment to diversity

When evaluating potential vendors for this project, we will evaluate proposals based on the following criteria:

- Primary
  - Understanding of and ability to meet our requirements
  - Cost, including willingness to offer non-profit discounts
  - Reputation
  - Support Offerings
- Secondary
  - Experience working with Educational Institutions and/or Nonprofits
  - Years of Experience

## Proposed Timeline

Below is a proposed timeline for the Vendor Selection process.

Vendor Selection	Start Date	End Date
RFP posted	11/8/2024	11/8/2024

Q&A session	11/13/2024	11/13/2024
Proposal submission period	11/14/2024	11/19/2024
Proposal submission review	11/20/2024	11/22/2024
Meetings with Finalists	11/25/2024	11/29/2024
Final Vendor Selected	12/2/2024	12/2/2024

## Proposal Submission Guidelines

The KIPP Foundation invites responses to this proposal by 11/19/2024. Please send the proposal by email to Mercedes Peters at [mpeters@kipp.org](mailto:mpeters@kipp.org) and Johel Placencia at [jplacencia@kipp.org](mailto:jplacencia@kipp.org) and cc [procurement@kipp.org](mailto:procurement@kipp.org). Responses should include:

- Cover Page: include contact information for the primary contact person
- Organizational description: briefly describe the organization’s history, mission, and key program areas
- Proposed Scope of Work
  - Describe the vision for the work and your intended approach
  - Describe how you would likely staff this work
- Pricing Guidelines – when submitting pricing breakdown, include project implementation costs with details outlined
  - Number and type of resources
  - Cost/hour for each resource
  - Overall cost
  - Support costs/rates following implementation launch
  - Information on nonprofit discounts, if applicable
- References: please include email address and phone number

Please contact Mercedes Peters at [mpeters@kipp.org](mailto:mpeters@kipp.org) with any questions about this RFP.