

KIPP Foundation Data Migration from Raiser's Edge to Salesforce – Request for Proposals

DECEMBER 2024

Project Overview:

KIPP Foundation seeks to migrate donor and prospect data from KIPP New York's Raiser's Edge CRM to the KIPP Foundation's Salesforce CRM. This project aims to consolidate and streamline donor management processes across the organization. KIPP is a federated network of independent 501c3 organizations. In this project, the data from one of the regional affiliates is being merged into the data for the national umbrella organization.

Objectives:

- Seamlessly transfer all relevant donor and prospect data from Raiser's Edge to Salesforce
- Ensure data integrity and accuracy throughout the migration process
- Minimize disruption to ongoing fundraising and donor management activities
- Establish a unified donor database within Salesforce for improved reporting and analysis
- Additionally, migrate fundraising files (e.g., PDFs, Docs, Slides, Sheets, image files, etc) from region's Google Drive to Foundation's SharePoint

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.

Detailed Scope:

1. Project Initiation and Planning:
 - a. Conduct kickoff meeting with key stakeholders from KIPP Foundation and KIPP New York
 - b. Develop a detailed project plan, including timeline, milestones, and resource allocation
 - c. Build detailed requirements documentation, including tracking and reporting requirements for the region, as well as requirements for configuring Salesforce to potentially accommodate data from more affiliated regions other than NYC in the future
 - d. Identify and document all data fields to be migrated
 - e. Establish data mapping between Raiser's Edge and Salesforce
2. Data Assessment and Preparation:
 - a. Perform a comprehensive audit of existing files in Raiser's Edge and Google Drive
 - b. Identify and resolve data quality issues, including duplicates, National Change of Address (NCOA) address updates, deceased records, and incomplete records
 - c. Develop data cleansing and standardization protocols
 - d. Create a data backup plan to ensure data safety during the migration process
3. System Configuration:
 - a. Configure Salesforce to accommodate one-time import of data from Raiser's Edge, and SharePoint to accommodate one-time import of files from Google Drive
 - b. Set up necessary custom fields, objects, and relationships in Salesforce
 - c. Implement data validation rules and triggers as needed
 - d. Develop and test any required custom integrations or middleware solutions
 - e. Update permissions setup in Salesforce to accommodate new staff/data, as needed
4. Data Migration:
 - a. Develop a robust data migration strategy, including plans for incremental data transfers and/or overlapping period of both CRMs being actively managed
 - b. Create and test data migration scripts
 - c. Perform a series of test migrations using a subset of data
 - d. Execute the full data migration process
 - e. Verify data integrity post-migration through comprehensive reconciliation

- f. Rebuild KIPP New York's Raiser's Edge reports, queries, and lists required for region in Salesforce and include in testing (< 100 total reports, queries, and lists).
5. Testing and Quality Assurance:
 - a. Develop and execute a thorough testing plan
 - b. Validate migrated data for accuracy, completeness, and consistency
 - c. Perform system integration testing to ensure proper functionality with existing Salesforce processes
 - d. Conduct user acceptance testing with key stakeholders from KIPP Foundation and KIPP New York
6. Training and Documentation:
 - a. Develop user guides and training materials for the new Salesforce environment
 - b. Conduct training sessions for KIPP Foundation and KIPP New York staff on accessing and managing migrated data
 - c. Create technical documentation detailing the migration process, data mappings, and any custom configurations, if requested by KIPP Foundation IT.
7. Go-Live and Post-Migration Support:
 - a. Develop a detailed go-live plan, including a rollback strategy
 - b. Execute the final data migration and system cutover
 - c. Provide immediate post-go-live support to address any issues or concerns
 - d. Conduct a post-implementation review to ensure all project objectives have been met
8. Project Management and Reporting:
 - a. Assign a dedicated project manager to oversee all aspects of the migration
 - b. Conduct regular status meetings with key stakeholders
 - c. Provide weekly progress reports and updates on key metrics
 - d. Manage project risks and issues, escalating as necessary

Deliverables:

- Detailed project plan and timeline
- Data mapping and migration strategy documents
- Cleaned and migrated donor and prospect data in Salesforce
- Test plans and results documentation
- User guides and training materials

- Technical documentation of the migration process and system configuration
- Post-implementation report and recommendations

Project Timeline:

The selected vendor should propose a detailed timeline for the project, with an expected completion within 3-4 months from the project start date. We will finish FY25 (ending June 30, 2025) with NYC on Raiser's Edge (for financial reporting purposes) and will begin using Salesforce only as of July 1, 2025.

Requirements for Vendor:

- Proven experience and successful results in CRM data migration and data merging projects, specifically from Raiser's Edge to Salesforce
- Expertise in nonprofit fundraising processes and data structures
- Certified Salesforce consultants on the project team
- Strong project management capabilities
- Excellent communication and stakeholder management skills

Out of Scope:

- Any modifications to the existing Raiser's Edge system at KIPP New York
- Development of new fundraising processes or workflows in Salesforce (beyond what's necessary for data migration)
- Ongoing maintenance or support of the Salesforce system post-migration (beyond the immediate post-go-live period)

Vendors are encouraged to provide any additional recommendations or services they believe would enhance the success of this data migration project.

Proposal Submission Guidelines:

The KIPP Foundation invites responses to this proposal by **1/17/2025**. Please send the proposal by email to Mercedes Peters at mpeters@kipp.org, Kate Persons at kpersons@kipp.org, and Johel Placencia at jplacencia@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

Please contact Mercedes Peters at mpeters@kipp.org with any questions about this RFP.