

Request for Proposal (RFP): Client Relationship Management (CRM) Implementation

Issued by: UFW Foundation

Purpose: The UFW Foundation is seeking a consulting partner to implement a unified system that will empower us to manage our programs effectively, customize workflows to our unique needs, and operate with greater agility. This solution will be built upon a foundational CRM to ensure seamless program and relationship management.

Organization

UFW Foundation is seeking a CRM platform and implementation partner that can support a high-security, multi-department environment with cross-functional stakeholders and varying levels of system maturity. The selected vendor will be expected to validate and refine the organizational profile during discovery. The selected vendor must demonstrate an ability to assess the current-state environment and address practical transition needs as part of the implementation approach.

- *Number of users:* ~100 internal
- *Data quality concerns:* duplicates, incomplete records, inconsistent data definitions, and legacy data issues.
- *Departments and functional teams in scope:* Administrative; Operations; Legal Services (Immigration and Workers' Rights); Communications and Marketing; Research and Data; Advocacy, Outreach and Institutional Advancement.
- *Current systems, tools, and data sources:* (This list is representative but not exhaustive) QuickBase, AWS, Asana, Egnyte, JAMF, Office 365, Givebuttr, Mobile Commons, Todoist.
- *Operational bottlenecks affecting coordination, service delivery, or decision-making:* Multi-department, multi-stakeholder processes that are not tracked or notified to involved parties (i.e. HR onboarding)
- *Programs and Services:* Legal services case management, Members Management, Grants Management, Donor Management, Finance and Accounting Management and Consolidation, Staff Management, Vendor Management, Procurement and Asset Management, Contract Management, Data ingestion, Reporting, Public education and training, Appointments Management, Secure Document Management, Events and Activities Management.
- *Reporting challenges, including timeliness, consistency, and usability of information:* Report generation and presentation is a manual process.

Goals

The goals of this initiative are to enhance program efficiency, improve collaboration and communication across departments and teams, increase adaptability to program changes, establish a centralized view of program and stakeholder data, and enable timely, data-driven decision-making across programs, operations, development, and leadership.

Business Outcomes

- Reduce manual workflows, ad-hoc spreadsheets, duplicate data entry, paper-based tracking, and disconnected operational handoffs across departments and programs.
- Improve visibility into programs, members, volunteers, interns, fellows, partners, internal stakeholders, activities, contributed hours, and service delivery outcomes.
- Increase organizational visibility into grant opportunities, applications, awards, reporting obligations, and key deadlines through centralized tracking and automated notifications.
- Improve cross-functional coordination through configurable workflows that define ownership, due dates, notifications, approvals, escalations, and process status.
- Improve data quality through standardized data models, required fields, validation rules, duplicate detection, merge processes, and consistent relationship tracking.
- Enable non-technical users to access reliable dashboards and reports without depending on manual report building, exports, or administrator intervention.
- Improve engagement and data quality by streamlining the collection, synchronization, and management of information submitted through UFW Foundation websites.

Functional Requirements

- The solution should support configurable lifecycle workflows for programs, grants, fundraising activities, service delivery, contacts, organizations, assets, and operational processes.
- Workflows should support role-based task ownership, handoffs, due dates, reminders, approvals, escalations, status tracking, and required completion steps.
- The solution should provide core CRM capabilities including contact and account management, relationship management, communications tracking, automation, custom forms, activity history, and engagement tracking.

- The solution should support centralized stakeholder management for individuals and organizations with multiple roles, affiliations, relationship types, programs, and engagement histories.
- The solution should support contact and account data quality management, including duplicate prevention, matching, merge processes, required identifying fields, and consistent categorization.
- The solution should support volunteer management from intake through participation, including interest forms, team routing, event registration, check-in, attendance, waivers, activities, and contributed hours.
- The solution should support time and activity tracking for volunteers, interns, fellows, and other participants, including submission deadlines, supervisor review, approvals, and exception tracking.
- The solution should support event and activity management, including participant rosters, attendance confirmation, bulk updates, document requirements, and post-event reporting.
- The solution should support secure document management within workflows, including required forms, waivers, attachments, document status, event-specific validity, and linkage to related records.
- The solution should support asset and access-related workflow steps, including equipment assignment, onboarding/offboarding handoffs, and tracking of completion status.
- The solution should support dashboards, reporting, and analytics by program, department/team, location, event, stakeholder type, time period, activity status, and contribution metrics.
- The solution should support calendar-based views of activities, deadlines, events, appointments, and workflow milestones, with role-based visibility and filtering.
- The solution should support secure mobile access for authorized staff performing field, event, intake, or approval activities.
- The solution should support auditing, change tracking, and activity history for key records, workflow actions, approvals, documents, and data updates.
- The solution should support configurable milestone-based notifications, reminders, and escalations for grants, contracts, compliance requirements, legal matters, operational tasks, reporting obligations, and other deadline-driven activities.
- The solution should support legal-services-related relationship management requirements, including the ability to identify and review potential conflicts among related individuals, organizations, matters, or cases.

- The solution should support the ingestion, import, and management of external data sources, including the ability to relate and associate external records with existing internal records and other CRM entities for integrated reporting and analysis.
- The solution should support email marketing and constituent engagement campaigns through audience segmentation, configurable tagging, automated outreach, and campaign performance reporting.

Technical and Architectural Requirements

- The solution should support future integrations through APIs, connectors, or standard integration methods.
- The solution should support integration with current or future systems for website forms, documents, email/notifications, identity, asset management, and reporting.
- The solution should support secure external or limited-access data capture for participants, volunteers, partners, and other non-staff users without requiring full internal CRM access.
- The solution should support mobile-friendly and field-ready experiences for intake, check-in, document capture, attendance validation, and supervisor review.
- The solution should support RBAC, IAM, MFA, and role-based access to sensitive records, workflows, reports, documents, and administrative functions.
- The solution should provide security controls for highly sensitive data, including encryption, access restrictions, auditability, and appropriate data segregation.
- The solution should include a sandbox environment for configuration, testing, training, migration validation, workflow validation, and user acceptance testing.
- The solution should prioritize standard platform capabilities, configuration, and maintainable extensions over unsupported or difficult-to-sustain customizations.

Scope

The scope includes discovery, solution design, configuration, implementation, testing, training, deployment, and post-go-live stabilization for the new solution. Scope may also include integration planning and execution, data migration, reporting enablement, role-based security design, documentation, and knowledge transfer.

Vendors must clearly identify all assumptions, dependencies, exclusions, and any items requiring separate authorization. Unless expressly approved in writing by UFW Foundation, the vendor should prioritize standard CRM capabilities and configuration over custom

work. Any recommendation for custom components must include the business rationale, risks, support implications, and available alternatives.

Vendor Response Requirements

Each proposal must address the following topics in a concise, structured manner sufficient for evaluation.

- **Vendor understanding:** Summary of the organization's apparent needs, challenges, and priorities
- **Recommended approach:** Proposed delivery model, phases, governance approach, and key assumptions
- **Philosophical approach:** Will the solution stick to standard workflows, models, and built-in systems or rely on heavy customization patterns.
- **Discovery methodology:** Planned discovery activities, stakeholder engagement, requirements validation, and expected outputs.
- **Data migration strategy:** Approach to assessment, cleansing support, mapping, migration, validation, and cutover readiness
- **Change management:** Communications, training, adoption support, and transition to business ownership
- **Team structure:** Proposed team, roles, responsibilities, and expected level of participation from UFW Foundation
- **Prior experience:** Relevant implementation experience in comparable environments
- **Risks:** Key risks, assumptions, constraints, and mitigation strategies
- **Estimated engagement structure:** Preliminary timeline, phase structure, resource model, pricing framework, and post-go-live support approach

UFW Foundation reserves the right to reject proposals that are incomplete, overly generic, dependent on undefined assumptions, or insufficiently responsive to this RFP.

Internal Governance Expectations

Vendors must be prepared to participate in regular project governance and decision-making meetings and to provide timely, transparent reporting on scope, status, risks, issues, budget, and dependencies.

- Clearly defined project roles, responsibilities, and escalation paths
- Regular status reporting and issue/risk management

- Formal change control for scope, timeline, budget, and solution decisions
- Documented decision logs, action logs, and key design artifacts
- Knowledge transfer sufficient to support internal ownership and long-term sustainability

UFW Foundation retains sole authority over business requirements, scope approval, prioritization, acceptance decisions, and any authorization to proceed between phases.

Evaluation Criteria

Proposals will be evaluated based on the criteria below. UFW Foundation may consider additional factors as needed.

- Demonstrated understanding of the organization's needs and current-state challenges
- Strength and practicality of the recommended implementation approach
- Depth of CRM and relevant integration experience
- Experience with custom workflows
- Experience with non-profit organizations
- Experience with Legal Services
- Communication strategies and Project Management skills
- Quality of data migration, testing, training, and change management approach
- Clarity of team structure, roles, and accountability
- Reasonableness and transparency of pricing and assumptions
- Ability to manage risk, protect organizational interests, and support long-term sustainability

Proposal Constraints

- Proposals must be clear, concise, and limited to the information necessary to respond to this RFP.
- Vendors must identify all assumptions, exclusions, dependencies, third-party products, and client responsibilities.
- Any pricing provided must clearly state what is included and excluded and must identify any time-and-materials components, contingencies, or optional services.
- UFW Foundation may request clarifications, additional information, interviews, demonstrations, or best-and-final offers.

- Issuance of this RFP does not obligate UFW Foundation to award a contract, reimburse any proposal costs, or proceed with any vendor.
- Any final award will be subject to successful contract negotiation, including acceptable terms related to scope, deliverables, acceptance criteria, timeline, pricing, confidentiality, data protection, intellectual property, warranty, indemnification, and limitation of liability.
- Vendor statements in the proposal will not be binding unless expressly incorporated into a fully executed written agreement.

Application Process:

Proposals should be received by 5:00 PM on Thursday, September 3rd 2026; however, we will accept proposals after this date, if necessary. Please submit via email to elimon@ufwfoundation.org in PDF format. Questions regarding this RFP should be directed to Enrique Limon, Technology Program Manager at elimon@ufwfoundation.org.