Reading Is Fundamental

until every child reads

Request for Proposals (RFP)
for a Comprehensive Data Alignment,
Technology, and Engagement Strategy Solution
FINAL VERSION as of 11.14.2024

Responses due by
5pm (EST) on Friday, December 13, 2024

1. **RFP Purpose**

Reading Is Fundamental (RIF) is seeking proposals from qualified agencies to lead a comprehensive project aimed at: (1) optimizing our data ecosystem, (2) confirming or revising our technology platforms, and (3) enhancing user engagement strategies. The overarching goal is to deepen engagement with our current users and maximize opportunities with prospects by optimizing how we manage, analyze, and act upon our data. This initiative will bring together siloed data across departments, databases and platforms, streamline complex processes, and implement processes that enable RIF to better understand and engage (while understanding and leveraging best practices) with its diverse audiences—primarily educators, school-adjacent partners, individual donors, families, and volunteers (and to understand if and when there is overlap and what are those implications).

The selected agency will conduct a strategic assessment of RIF's existing data, systems, and engagement practices. Based on this assessment, the agency will develop a roadmap for data alignment and technology optimization, helping RIF maximize engagement, expand reach, and improve internal efficiencies. This initiative supports RIF's mission to address the U.S. literacy crisis and inspire the joy of reading in children by deepening engagement with gatekeepers (educators, families, and volunteers).

We seek a partner who offers both strategic insights and hands-on implementation, ensuring the sustainability and scalability of our systems in line with industry standards. Whether directly or through third-party partners, the agency should deliver solutions that are aligned with best practices and designed for long-term impact.

2. **Background Information on Reading Is Fundamental**

Reading Is Fundamental (RIF) is committed to a literate America by inspiring a passion for reading among all children, providing quality content to create impact, and engaging communities in the solution to give every child the fundamentals for success. As the nation's largest nonprofit organization for children's literacy, over the past 56 years RIF has provided more than 422 million books to over 129 million kids in all 50 states, inspiring generations to read, learn and grow. Learn more at www.RIF.org.

Our vision: A nation of lifelong readers.

Our mission: Reading Is Fundamental works to disrupt the alarming U.S. literacy crisis by inspiring the joy of reading in children, a critical element to driving the frequency, motivation, and engagement needed to create skilled readers. We know that if we build a foundation of joy for children, then development, discovery, and opportunity follow.

More on RIF's programs, digital products, services, and content:

1. **Books for Ownership**, RIF's flagship reading program, enables children to select new, age-appropriate books to take home and own and is supported by resources for families, educators, and local literacy advocates to create a culture of reading. This program relies on a simple yet fundamental truth: if you allow children choice and access, they will become more engaged readers and learners.
2. **Read for Success** is designed to support children birth through grade 3 as is an interactive read-aloud solution that uses high-quality, diverse, interdisciplinary books

with research-backed strategies and activities to engage children in the reading experience and encourage a passion for reading. This research-backed program is based on the wide body of research that demonstrates that both reading to children and independent reading are key components of literacy development

3. **Skybrary** is RIF's carefully curated digital library of eBooks and video explorations for children ages 2 to 9. This interactive library offers nearly 1,000 children's books from celebrated authors, illustrators, and leading publishers. It also features hundreds of video field trips hosted by beloved storyteller LeVar Burton to engage young readers and encourage a passion for reading. Skybrary engages children through child-friendly navigation and themed collections of eBooks, with optional read-to-me narration and interactive animation. Skybrary is available for use in the classroom and at home. (https://skybrary.org/)

4. **Reading Engagement:** RIF provides free opportunities for reading engagement all year round to ensure there is new, timely, and meaningful content to drive reading joy and excitement in school and at home. We continuously seek opportunities to re-energize and motivate our nation's children to read.
   - **Rally to Read** is an annual 6-month reading engagement initiative anchored on monthly themes, read-alouds by popular children's authors and illustrators, reading activities, a pledge to read 100 books, and a book giveaway sweepstakes for educators. Rally to Read 100 provides teachers and families with new content during the critical back-to-school time to excite young readers each month and culminates during National Reading Month in March.
   - **Soar into Summer** provides families with compelling reading content to help their child read all summer long, combating the very real declines in reading frequency and motivation that happen during these months. RIF offers fresh, new, recommended summer book collections vetted by RIF's literacy experts, related reading activities, reading tips for families, summer book club ideas, and more to create purposeful reading connections throughout the summer.

5. **Additional Resources:**
   - **Literacy Central** is an online destination for teachers, families, and literacy volunteers, offering over 30,000 free resources tied directly to the books children love and teachers turn to every day. Literacy Central offers curated book collections with a wide selection of diverse books by diverse authors, literacy activities including games and puzzles, monthly activity calendars, read-aloud videos, and much more.   (https://www.rif.org/literacy-central)
   - **Literacy Network** is RIF's online community support center offering a suite of resources, information, and tools to support RIF program implementation, community capacity building, and local literacy impact. It serves as a one-stop destination for educators, volunteers, and families to access turnkey, customizable solutions. Literacy Network augments local literacy efforts, offering information and support around literacy issues, RIF's programmatic solutions, program implementation resources, and volunteer opportunities. (https://www.rif.org/literacy-network)
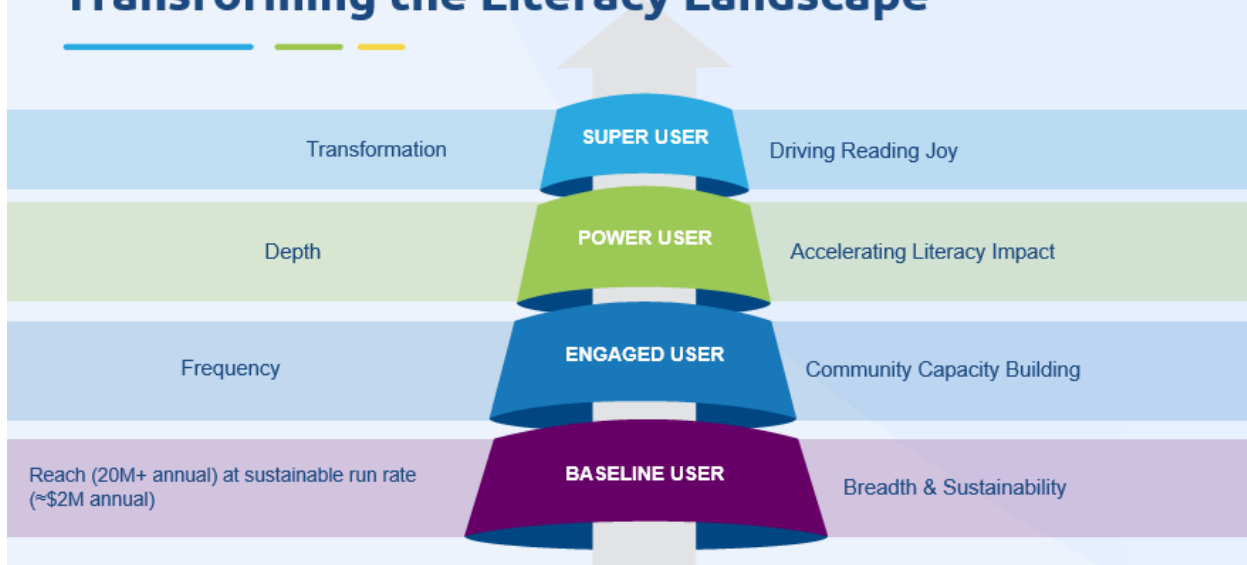
3. **Project Vision:**

Upon completion of this project, Reading Is Fundamental (RIF) will be transformed into a **fully data-driven organization** with the capacity to deeply understand, engage, and inspire every individual we touch—whether they are students, educators, families, or donors. By unifying our data systems and aligning processes across all departments, we will gain a **360-degree view of each user**, allowing us to tailor our communications, resources, and programs based on their unique needs and interaction history.

This project will empower RIF to:

- **Implement Data Maintenance Procedures:** By adopting industry best practices for data maintenance and list management, RIF teams can confidently rely on their data systems for accuracy, cleanliness, and effective management. This will allow RIF to fully leverage its data across all areas of its work, including the effective use of third-party and leased lists.
- **Update Engagement Processes and Platforms as Needed:** RIF will have a streamlined, efficient, and cost-effective email marketing system that enhances user engagement and brand loyalty. The updated email marketing platform will serve as a strategic tool to strengthen connections with RIF's audience, driving engagement with programs and content. All email communications will be personalized, segmented, and impactful, ensuring a consistent and meaningful experience for users, ultimately supporting RIF's mission and long-term sustainability.
- **Deepen Engagement with Existing Users:** With a centralized and streamlined data ecosystem, we can personalize the user experience at every touchpoint. Educators, families, and donors will receive more relevant resources and communications that reflect their specific interests and prior interactions. This tailored approach will drive higher engagement, increase participation in our programs, and foster a stronger sense of community around RIF's mission.
- **Expand Reach to New Audiences:** Through better insights and audience segmentation, we will identify and engage untapped communities, ensuring that more children across the U.S. have access to the joy of reading. With enhanced engagement strategies and data-driven outreach, we can strategically grow our impact, reaching new users who are aligned with our mission but not yet connected to RIF.
- **Improve Efficiency and Collaboration:** A unified data system will break down silos between departments, enabling seamless collaboration across teams and functions. Staff will have easy access to shared data, reducing redundancies and allowing for more efficient workflows. This transparency will foster better alignment of goals and tactics across the organization.
- **Generate Actionable Insights for Strategic Growth:** Layering on data analytics and business intelligence tools will provide leadership with actionable insights into the effectiveness of our strategies, programs, and campaigns. We will be able to measure the impact of our work in real time, course-correct as needed, and make data-driven decisions that maximize return on investment (ROI) for our mission.

- **Enhance Stewardship and Long-Term Relationships:** The holistic understanding of each user's journey will allow us to build stronger relationships with our key stakeholders, including donors, educators, and families. With smarter segmentation and deeper

engagement tactics, we can increase donor retention, boost giving, and cultivate long-term advocates who support RIF's mission for years to come.

Deepening User Engagement: Transforming the Literacy Landscape

Transformation	**SUPER USER**	Driving Reading Joy
Depth	**POWER USER**	Accelerating Literacy Impact
Frequency	**ENGAGED USER**	Community Capacity Building
Reach (20M+ annual) at sustainable run rate (≈$2M annual)	**BASELINE USER**	Breadth & Sustainability

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Lauren

- Learned about RIF through Skybrary
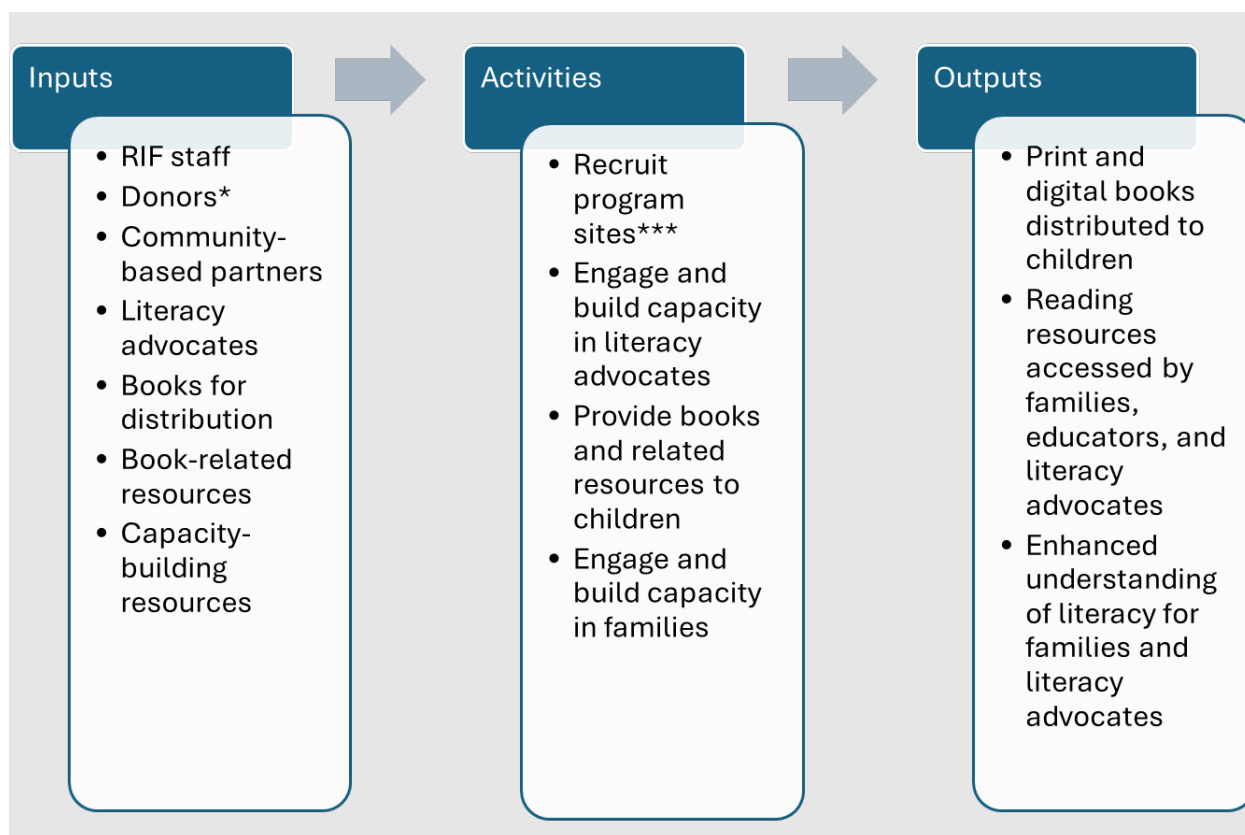- Attends every Educator Webinar
- Now Gives Monthly $10 Gift

Lauren is just one example of a potential super user we are hoping to unlock by this project. It could be an educator who not only uses RIF's resources for classroom activities but also actively shares feedback, participates in programmatic events, and champions RIF in their community. With personalized engagement strategies and better data insights, this user could help amplify RIF's reach by introducing new educators and families to our mission. Their deeper involvement could lead to valuable insights for resource development, greater program adoption, and an expanded network of literacy advocates. Who knows? With the right stewardship strategies, they might even leave RIF a planned gift one day!

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4. **Mission Critical Alignment**

We need a unified data ecosystem that allows us to measure, track, and optimize every touchpoint with our users—educators, families, donors, volunteers and partners—ensuring that each interaction contributes to meaningful outcomes. By aligning our data practices with our theory of change, we will be able to better evaluate the return on investment (ROI) of our strategies, programs, and outreach efforts as well as measure key organizational and mission KPIs. This project aims to equip RIF with the tools and insights needed to make data-informed decisions that enhance engagement, expand our reach, and ultimately improve literacy outcomes. Every data point must be in service of our mission, enabling us to adjust course, optimize resources, and scale our impact effectively and sustainably.

Inputs	Activities	Outputs
• RIF staff • Donors* • Community-based partners • Literacy advocates • Books for distribution • Book-related resources • Capacity-building resources	• Recruit program sites*** • Engage and build capacity in literacy advocates • Provide books and related resources to children • Engage and build capacity in families	• Print and digital books distributed to children • Reading resources accessed by families, educators, and literacy advocates • Enhanced understanding of literacy for families and literacy advocates

Literacy advocates/Users terminology is used interchangeably. Literacy advocates are made up of individuals, volunteers, educators, school/district administrators, school adjacent partners like program directors at Boys and Girls Club or YMCAs, parents/caregivers, etc.

More about our theories of change can be found here: https://www.rif.org/our-solutions/rif-model/theory-change

5. **The Challenge**

Over the past seven years, Reading Is Fundamental (RIF) has experienced rapid growth, expanding its programs, audience reach, and internal operations. To-date, RIF has **close to 3**

million contacts within our different databases, including some data inherited from legacy systems and roughly 1.3 million dormant contacts from our acquired Skybrary platform. This growth has been driven by empowering various teams across the organization to adopt technology and processes that best support their specific business functions—whether program management, fundraising, marketing, or partnerships. While this approach allowed for flexibility and immediate efficiency gains, it has led to the creation of multiple, siloed databases and disparate systems for managing data.

Key Pain Points Around Data:

- **Fragmented Data Ecosystem and Email Practices:** Each department operates with different systems, tools, policies, and external vendors to manage user data, creating fragmented touchpoints and posing significant risks to RIF's operations. Without consistent guardrails, teams have inadvertently harmed the organization's domain and IP reputation by deploying emails to large groups without proper safeguards—such as using alternative and sub-domains or implementing warming strategies for leased lists. This disjointed approach not only jeopardizes our ability to send emails effectively but also prevents us from gaining a unified, 360-degree view of our users (educators, donors, families, etc.), limiting our understanding of their engagement with RIF's programs and resources. Furthermore, we lack a cohesive data ecosystem that supports efficient communication and engagement strategies across the organization.
- **Inconsistent Data Management:** The lack of standardized processes for collecting, storing, and analyzing data has led to inconsistencies across departments. Data may be duplicated, incomplete, or not easily accessible, creating inefficiencies in reporting, engagement strategies, and decision-making. Data accuracy is a constant concern.
- **Complex and Manual Processes:** The complexity of many of RIF's existing systems often requires external expertise to manage. While some automated syncing between systems is in place, data manipulation and loading into these systems is largely manual, creating inefficiencies and making it difficult to operate without specialized knowledge. This reliance on external support not only slows down processes but also increases the risk of errors and misalignment across departments.
- **Lack of Internal Expertise:** RIF does not currently have a dedicated head of technology or data, leaving the organization without strategic leadership in these critical areas. Additionally, the marketing team lacks the expertise needed to effectively manage and deploy email engagement campaigns. This gap in internal capabilities limits RIF's ability to optimize its technology stack, manage data efficiently, and fully leverage email as a tool for engagement and user outreach. As a result, external support is frequently required, adding complexity and reducing agility in executing marketing and engagement strategies which leads to our desire to fully outsource our email marketing
- **Limited Insight into User Touchpoints:** Without a centralized system, it is challenging to track and analyze all the interactions an individual user has with RIF across different teams and initiatives. This disjointed approach means we miss valuable opportunities to tailor communications, deepen engagement, and optimize program offerings based on a holistic understanding of each user's journey.
- **Missed Opportunities for Growth and Stewardship:** With data locked in separate systems, RIF lacks the ability to scale personalized outreach, accurately measure impact, or engage users more deeply based on their full interaction history. This not only hampers strategic planning but also limits our ability to nurture high-value relationships, such as donors, educators, and community advocates, who could become champions of our mission.

6. Project Scope

To overcome the listed challenges and continue to scale effectively, RIF believes we need to align our data, technology systems, consolidate touchpoints, and enable cross-departmental visibility. RIF is looking for an agency with the expertise to lead the organization through the following process:

- **Strategic Review and Analysis:** Conduct a thorough analysis of RIF's current data and technology ecosystems with the emphasis on those utilized for user engagement (email marketing systems). Review the corresponding user engagement practices, systems, and communication channels. Assess the existing infrastructure, sources, and flows to identify strengths, weaknesses, gaps, and opportunities for improvement, ultimately making a recommendation on how data is consolidated (or not), stored, warehoused, and leveraged for user engagement organization wide. The agency is expected to create a comprehensive roadmap with phased timing to align to recommended changes.
- **System Implementation:** Beyond the strategic analysis, the agency must also be capable of implementing the proposed system changes. This includes configuring and integrating new platforms, optimizing current systems, and ensuring smooth data migration and consolidation (where necessary). The partner will work closely with RIF to implement the roadmap in a phased approach, ensuring that all systems and processes are aligned with best practices and are sustainable for long-term use.
- **Optimize Data Management:** Create a data-driven framework that allows us to efficiently manage and analyze our user data for improved decision-making and communication. Make recommendations and a corresponding roadmap for upgrades or new tools that align with best practices in data management, marketing engagement, and business intelligence.
- **Deepen User Engagement:** Assess RIF's current audience segmentation, list management, and engagement strategies. Propose a framework to measure and increase user engagement with current stakeholders (donors, families, educators, etc.), identifying key drivers of engagement (e.g., content, campaigns, personalized communications).
- **Recommend Best Practices**: Provide strategic recommendations that will be used by non-technical stakeholder for enhancing our user engagement approach, including data management, stakeholder engagement, and technology alignment, providing training to staff and in the initial phase, fully managing these activities.
- **Training and Knowledge Transfer:** Develop training materials and lead sessions for staff to effectively use the new systems and processes. Ensure RIF staff can manage user engagement, data management, and data strategies independently post-project.
- **Actionable Insights and Reporting:** Surface actionable insights that allow RIF to deepen engagement and refine outreach strategies. Provide ongoing reporting tools that simplify data analysis, help monitor the success of user engagement tactics and enable RIF to surface additional insights in the future.
- **Support Mission Fulfillment:** Align all activities to drive RIF's mission to inspire the joy of reading in children, increasing motivation and engagement that builds skilled readers.

RIF understands that each prospective agency will have different processes, project methodology, and recommended solutions. However, all RFP responses and proposed data and technology solutions must deliver a solution considering the following:

- <u>360-degree view of all users:</u> Achieve a holistic understanding of user interactions and behaviors across all engagements and touchpoints.
- <u>Surface actionable insights:</u> Identify key insights to drive deeper engagement with users.
- <u>Scalable analysis:</u> Enable scalable analysis of strategies, workflows, and tactics to increase ROI.
- <u>Layer on data analytics and business intelligence:</u> Integrate advanced analytics and Business Intelligence tools to enhance decision-making.
- <u>Democratize data for non-technical skill sets:</u> Make data accessible and understandable for all staff, regardless of technical expertise.
- <u>Ease of reporting:</u> Simplify the process of generating and distributing reports.
- <u>Simplify processes:</u> Streamline and automate data-related processes to improve efficiency.
- <u>Align to market best practices:</u> Ensure that RIF's data practices align with industry standards and best practices.

7. Information on RIF's Audiences

RIF engages a diverse audience, with a primary focus on educators in the birth-12 market, who are central to delivering RIF's mission of inspiring a love of reading in children. In addition to schools, RIF actively collaborates with school-adjacent partners such as PTAs, Little Free Libraries, YMCAs, Boys and Girls Clubs, and other like-minded nonprofits that serve children and families in their communities.

RIF also maintains strong relationships with donors and philanthropic partners, who provide critical funding for programs including corporate partners (e.g. Macy's), foundations..... Beyond these core audiences, RIF also periodically engages families of the children we serve, volunteers who help amplify our mission, and authors who contribute their voices and content to inspire young readers. Each of these groups plays a vital role in supporting and expanding RIF's impact, and this project aims to deepen engagement and optimize stewardship across all audience segments.

Basic Facts About RIF's Audiences:

- RIF is approaching nearly 3 million contacts across all our systems.
- However, RIF is only actively engaging about 750,000-800,000 contacts per month.
- There are another 1.3 million inactive contacts from our Skybrary platform that either need to be archived, deleted, or re-engaged while keeping in mind that we have to keep track of unsubscribes. Some of these are individuals that opted in for a trial without converting so retargeting might be a possible tactic.
- The remainder of our list is likely individuals that have unsubscribed or historical data that needs to be cleaned up.
- Over 80% of the contact list is made up of educators in the K-12 market.
- Roughly 15% of the contact list is made up of school adjacent partners.
- The remainder of the list is comprised of individual donors and donor prospects.

- However, it is important to note that there is likely overlap between all lists, but the full extent is unknown.
- Our growth in educator contacts has been through acquisition and leased names, first through Agile, and most recently, through MDR (approx. 400,000 contacts annually)
- Donor engagement (both current donors and prospects) is managed by the Development team, in partnership with an outside vendor, Lautman (roughly 2-3 emails per month). Primary systems used are Raiser's Edge (data storage) and Engaging Networks (email deployment).
- The bulk of non-donor communications (focused on content marketing and program engagement) are managed by the Marketing Team (roughly 20-25 emails per month). The primary systems used are Salesforce (data storage) and Engaging Networks (email deployment).
- Skybrary data is stored within the platform itself and emails are deployed through SendGrid.
- Some additional communications are managed by the Program Team for program activation and implementation, partner recruitment for new grants, and general program operations. Our systems also send automated messages at the sign-up stage (e.g. creating a Literacy Central/Literacy Network account, purchasing a Skybrary subscription, etc.). The primary system used is Salesforce (data storage and email deployment).
- Emails are primarily sent from Engaging Networks (current contract runs through March 31, 2025), SendGrid (for Skybrary), or Salesforce (for Programmatic emails).
- RIF has engaged a short-term partner to review the email records for validation, threat detection, and recommendation for list pruning to support email deliverability.
    - Note: Our list is a bit unique given its make-up of majority educators who are using Google Workspace as their email service provider and the recent updates Google has made re: authentication.

8. Proposal Overview

Proposal Submissions
One (1) electronic PDF copy is to be submitted by email to the address below by 5:00pm EST on Friday, December 13, 2024. Proposals received after this deadline will not be considered. Please submit proposals to:

Katy Nicholson
Vice President, Programs
KNicholson@RIF.org

Criteria for Evaluation
Each proposal will be evaluated against the following criteria. These criteria are in the order of significance to the selection and weighted for clear understanding of the priorities:

1. **Experience and Expertise (30%)**

- Demonstrated experience in user engagement, data optimization, and technology implementation for non-profits or mission-driven organizations.
- Understanding of digital and email marketing and engagement for a largely educator audience.
- Relevant case studies and successful track records on similar projects.
- Expertise in working with complex systems and integrating multiple data platforms.

2. **Approach and Methodology (25%)**
   - Clear plan and methodology for how the agency will approach strategic assessment, data alignment, and system integration.
   - Innovation and creativity in addressing the organization's specific needs, including actionable insights and long-term solutions.

3. **Cost and Value (20%)**
   - Cost-effectiveness of the proposal, with detailed budget breakdown by scope deliverable.
   - Value offered relative to the scope of work and deliverables.
   - Flexibility and potential for long-term savings or reduced reliance on external expertise.

4. **Timeline and Implementation Plan (15%)**
   - Feasibility of the proposed timeline, including key milestones and deliverable schedules.
   - Clear path for implementation, including phased deployment, testing, and staff training.

5. **References and Recommendations (10%)**
   - Strong references from similar projects or clients, with testimonials or endorsements.
   - Quality of feedback from prior work, particularly in non-profit and educational sectors.

Proposal Format
Please provide responses to the proposal requirements below in the order they are listed. Additional information may be provided as addendums if appropriate.

Proposal Questions
All questions concerning this RFP should be directed to Katy Nicholson via email at KNicholson@rif.org and be submitted by December 2nd, 2024. All questions and answers will be disseminated to every proposer via email by December 9th, 2024.

RFP Timeline
RIF has established the following timeline in relation to this project. Please note that dates are subject to change. Vendors will be notified, via an addendum to this RFP, of any changes in the timeframe.

| RFP Distributed | 11/15/24 |
| Proposal Deadline | 12/13/24 |

Short list of vendors determined and notified	1/10/25
Interviews with short listed vendors	1/13/25-1/22/25
Award notification	1/31/25

Proposal Contents
The proposal should include the following:
1. Qualifications of the company and staff, particularly those assigned to RIF.
    a) Provide a company overview as well as the names, titles, and biographies of any key individuals who would be directly responsible for providing services, detailing their roles and the scope of their involvement for this assignment.
    b) Identify the total number of non-profit clients by type and the average length of relationships. Please provide examples for each nonprofit client that has similar services.

2. Company's approach to the scope of work described in Section 5.
    a) Include proposed implementation approach, timeline, and project management methodology.
    b) Provide a detailed response aligned to each service listed in Section 5, including details of the proposed data alignment solution with a comprehensive roadmap, including features, functionalities, and compatibility with our existing systems and listed requirements. Please be sure to elaborate on your approach to the data migration (if applicable) and testing process.
    c) Please indicate, where applicable, where you would call on the services of a third-party vendor to deliver against one of the services listed in Section 5, providing the partner name, website, the nature of your working relationship. RIF reserves the right to contact references for additional vendors as well.

3. The cost of all services.
    a) Include core fee structure and additional schedule of any fees that may be incurred.

4. Client References.
    a) Provide a list of three client references for whom you have performed work in the past 5 years.

Confidentiality
All information provided as part of and in response to this RFP is considered confidential and should not be disclosed to third parties without prior consent from RIF.

Thank you for considering this opportunity to collaborate with Reading Is Fundamental. We look forward to receiving your proposals and exploring the possibility of working together to achieve our data alignment objectives.

Appendix

1. **Current Technology and Data Ecosystem**

Reading is Fundamental currently has the following stand-alone tools and/or platforms in use by the organization:
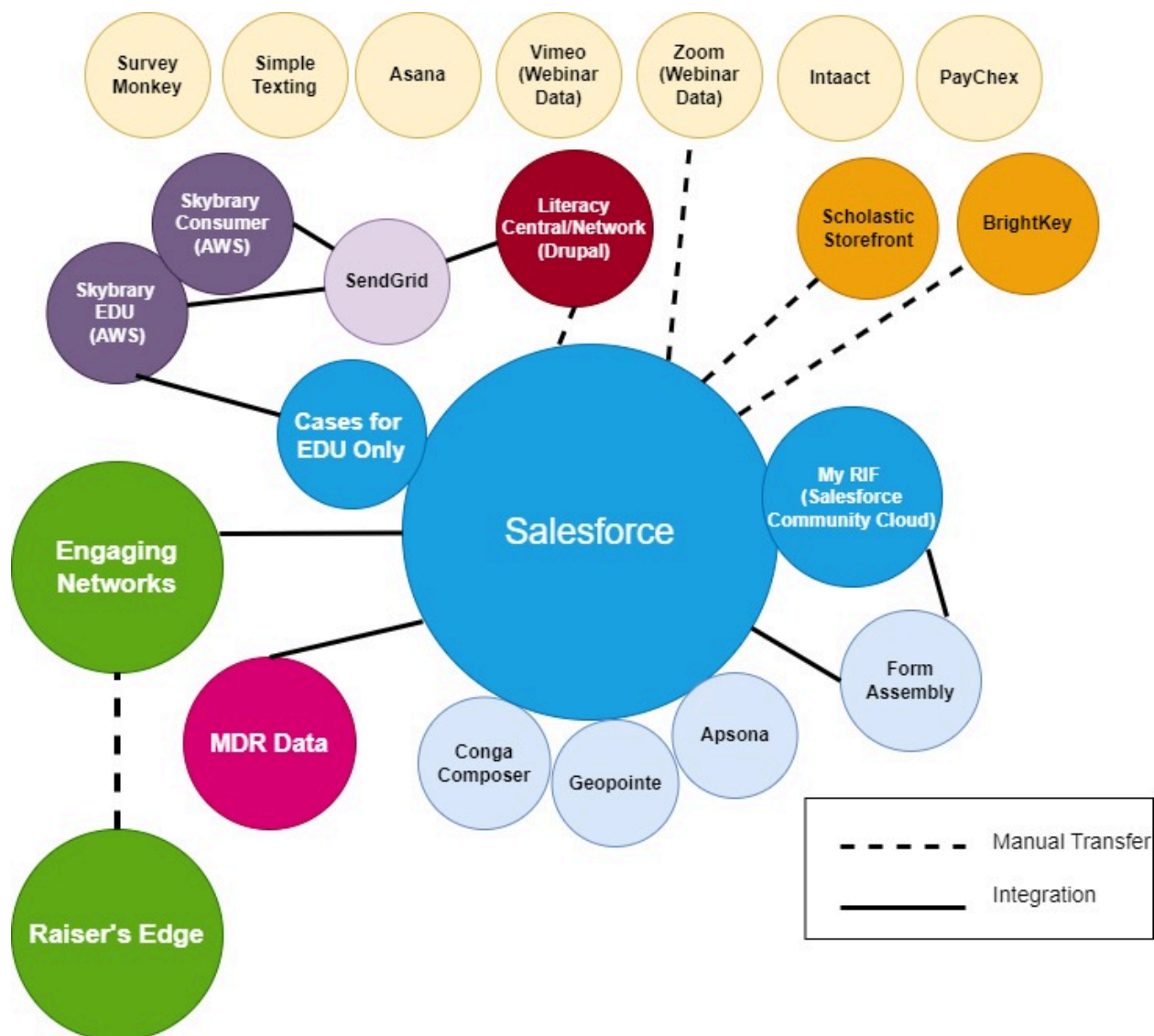
Application	Purpose	Usage
MDR	Third-party data and marketing partner that provides potential program site contact & demographic information. We also lease email lists from them.	Programs Team & Marketing Team
My RIF (Community Cloud)	Allows site implementers to have visibility into their salesforce data and share information with RIF.	Programs Team
Send Grid	Handle transactional emails related to Skybrary and Literacy Central – reset password, update account information, etc.	Skybrary Team
Scholastic Storefront	Where sites select their book inventory from Scholastic. RIF sends allocations to the storefront and receives monthly transaction statements.	Everyone, Public Facing

Literacy Central	Hosts Literacy Central site and content, user information. This instance allows credentialed users to like RIF-generated content and create custom content (ex. Crosswords). There are currently 33k credentialed users, 3k 'like' folders, and 10.5k user generated puzzles.	Everyone, Public Facing
Skybrary Consumer	Skybrary consumer site, content, user information. Has different code base than the EDU version, but the database flows through AWS.	Skybrary Team, Public Facing
Skybrary EDU	Skybrary EDU site, content, user information. Has different code base than the consumer version, but the database flows through AWS.	Skybrary Team, Public Facing
Salesforce Cases	Skybrary EDU tickets.	Skybrary Team, Programs Team
Intacct	Accounting platform that serves all finance needs. Relevant to bookstore balances and timesheet tracking.	Finance Team and All Staff
Raiser's Edge	Legacy CRM system that houses donor and donation data.	Development Team
Engaging Networks	Fundraising and communications platform. Donations made through site; payments processed by EN. Also hosts email newsletter.	Marketing & Development Team
FormAssembly	Gather information from program sites and used from key initiatives like campaigns and sweepstakes	Programs & Marketing Team
Asana	Internal Project Management.	Programs Team, Marketing Team
Apsona	Used for merging records and uploading transaction data	Programs, FIN Ops Team
Conga Composer	Merges documents and e-signature.	Programs Team
Geopointe	Has functionality to map out where users are located and match them to current programmatic activities.	Programs Team
Zoom	Used to deliver onboarding webinars for program implementers and professional learning webinars for the general public.	Programs Team, Content Team
Simple Texting	Used to deliver engagement messaging related to specific programming, most	Marketing Team, Development Team

	commonly used for donors or family engagement.	
Stripe	Processes Skybrary consumer payment information and is relied upon by Finance for accuracy.	Digital & FIN/OPS Teams
Vimeo	Once webinars are recorded, the team posts the video to Vimeo. We try to capture email data for each view so we can understand the full impact of our webinars.	All Teams

- *Note: Some third party and standalone tools are not included in this list as they likely do not pertain to the work identified in this phase – i.e. Skybrary Drupal technical infrastructure, RIF/Literacy Central/Literacy Network Drupal technical infrastructure, Rally to Read Drupal technical infrastruc*ture, *Azure, Acrobat, Google Analytics, Quicksight Reporting, Weglot, HotJar, Trello, Sprout Social, Canva, Adobe Creative Suite, Microsoft Suite, Cision, DropBox, Google Suite, Slack, Teams.*

2. RIF Data Sources

RIF captures data from a variety of different sources. Some of which makes its way into our databases, but not all. We need a consulting partner to turn our data lake into cohesive information in pursuit of our mission.

Data sources include:
Key: Engaging Networks (EN); Salesforce (SF)
- Social media followers
- Enews sign-up pages (EN)
- Literacy Network Account Sign Ups (SF)
- Literacy Central Account Sign Ups (SF – manual load)
- Webinar registrants/attendees (SF – manual load)
- Pledges- summer reading, rally to read, etc. (SF – manual load)
- Simple Texting opt-ins
- Program research results
- Engagement Actions (EN/Sendgrid)
- Rally to Read Sweepstakes Entrants (SF – manual load)
- MDR Educator Data (SF)
- Skybrary subscriptions (Skybrary)
- User Surveys
- Website Pageviews and Actions - Google Analytics
- Paid Advertising Outcomes
- Cision
- Digital Advertising
- Google Grant
- Microsoft Excel
- Vimeo
- YouTube

- Donor Data (primarily stored in Raiser's Edge):
  - A few times a week: Direct Mail Processors gift and donor data via spreadsheet (CSV) import process
  - Weekly Engaging Networks (EN) data import via Omatic load supplemented by manual corrections
  - A few times a week: In house (check log) entry via manual batch creation process
  - Semi-monthly: one-time ACH entry via manual batch creation process
  - Monthly: recurring ACH entry via spreadsheet import process
  - Monthly: SMS consent import via Omatic load supplemented by manual corrections
  - Roughly once a month (every time we do a mailing): mail file information is imported into Raiser's Edge via spreadsheet import process
  - Quarterly: import MAJ attributes via spreadsheet import process
  - Quarterly: National Change of Address (NCOA) updates via Blackbaud Address Finder – many addresses get automatically updated by Blackbaud, but others must be manually updated via spreadsheet import process
  - Semi-annually: updating Major Donor and Major Donor Prospect constituency codes via spreadsheet import process
  - Annually: Engaging Networks "Share Your Story" information via spreadsheet import process
  - On ad hoc basis (frequent; can be daily) - Microsoft Outlook plugin that sends e-mail information to Raiser's Edge when we send e-mails from Outlook that are related to e-mail addresses stored in Raiser's Edge constituent records
  - On ad hoc basis (frequent; weekly): manual donor or gift record creation, e.g., monthly payroll deductions for staff members, or moving gifts from one record to another manually if they were imported onto an incorrect record, or creating a donor and/or gift that was missed originally in ACH backup
  - On ad hoc basis (frequency depends on solicitor actions, e.g., did a mailing go out?) - action information (e.g., mailings, phone calls) via spreadsheet import process or by manual action record creation
  - On ad hoc basis (a few times a year): import of selected wealth screening data via spreadsheet import process
  - On ad hoc basis (maybe roughly annually): Welcome Package Survey attributes via spreadsheet import process
  - On ad hoc basis (maybe annually or once every few years): AgeFinder data import, PhoneFinder data import via spreadsheet import process

Current Data Flow

Diagram Key
- 🟨 Department
- 🟩 CRM
- 🟦 Outside Consultant
- 🟦 Email Platform
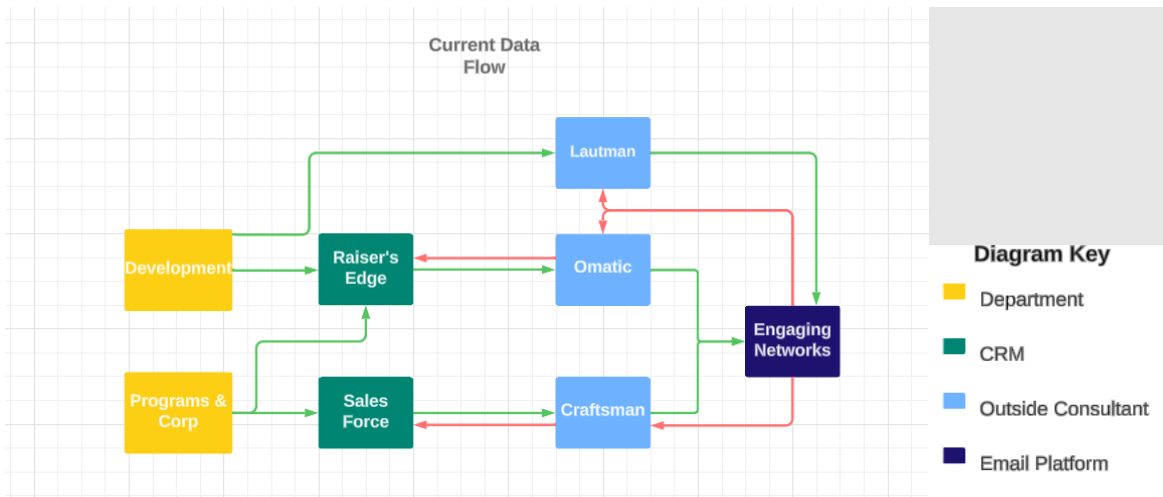
3. **Salesforce System Architecture**

Initially, RIF desired to have Salesforce serve as our organization-wide database of record. However, we are looking for an agency to weigh in on that assumption before moving any additional data into the system. As it stands, RIF has a highly customized and automated system focused on program operations. Over the last few years, RIF has begun integrating additional teams and workflows into the system, but it has not been adopted by the full organization with a user account for each team member.

RIF currently outsources its Salesforce Administrator needs to Craftsman Technology Group.

To-date, RIF currently has a Salesforce instance with the following components:

- Program Management Lightning App
- Salesforce Customer Community
- Form Assembly Integration
- Geopointe Application
- Non-Profit Success Pack (NPSP)
- Engaging Networks Integration
- Conga Composer
- Conga E-Signature
- Volunteers for Salesforce
- Declarative Lookup Rollup Summaries Tool
- Apsona
- Service Console

Current Salesforce Data Structure

- **Contacts.** Contact records represent individuals that RIF knows, has interacted with, or wants to engage. This includes staff, site representatives, contacts at funder organizations, volunteers, parents, etc. Existing record types include:

- o **General Contact.** Primary record type for most contacts.
  - o **List Buy Prospect.** Solely for "leads" imported from List Buys (e.g. MDR, Agile)
  - o **Vendor.** Used mainly to track event vendors in different markets such as photographers, balloon vendors, etc.
- **Accounts**. Accounts represent organizations that interact with RIF and Households of contacts. Every contact must be associated with an account. Existing record types include:
  - o **Funder.** An Account representing a RIF funder.
  - o **Organization.** An Account representing a program site.
  - o **Household Account.** An Account representing a household containing one or more individuals (including volunteers not connected to a program site).
- **Programs (Custom Object).** Programs represent a program at a specific site location for a given period of time. A site can have multiple Programs. Current record types include:
  - o **Books for Ownership**
  - o **Books for Ownership Matching Grant**
  - o **Book Fund**
  - o **Literacy Kits**
  - o **Read for Success**
  - o **Read for Succes Matching Grant**
  - o **Skybrary**
  - o **Skybrary Matching Grant**
- **Program Events.** This is a custom object that is distinct from the Salesforce standard object called Events.
- **Program Requirements and Templates.** used to track critical milestones and required documents for programs. Templates are used to create sets for different types of programs. Sample requirements include:
  - o Sign and Return Award Letter
  - o Submit W9
  - o Submit Sales Tax Exempt Certificate
  - o Submit Payment
  - o Submit Program Event Dates
  - o Order Books from RIF's Bookstore
  - o Complete Programmatic Activities
  - o Complete Activity Reporting
  - o Share Impact Surveys
  - o Funder Thank You Note
  - o Engage Employee Volunteers
- **Campaigns.** Currently used to track a group of contacts related to a specific programmatic project to recruit participation by each program implementer and share critical updates throughout the program period. Not used for general marketing.
- **Campaign Members.** A campaign member is a junction object that links contacts to campaigns. It pulls certain information from the contact and assigns a status to the contact.

- **Collateral Items.** Is used as a long of the varying types of program collateral that are created and distributed to program implementers and the children they support (ex: tote bags, bookmarks, bookplates, etc.)
- **Collateral Orders.** These are used to track new incoming inventory and specific amounts distributed to each program site.
- **Projects.** These house the specific information, timelines, and deliverables for grants funded by corporate partners, foundations, and federal grants.
- **Program Activity Report & Program Impact Story.** For use in providing regular updates about how the implementation of the program is going and the effect the program is having on the children in the program. Can be submitted directly from sites via the MyRIF Community site.
- **Cases.** A case is a customer's question, feedback, or issue. They are currently set up as a web to case form on the MyRIF Community page when you click on "Ask RIF for Help" at the bottom of the home screen. Cases are only configured for Skybrary users.
- **Opportunities.** Opportunities, or donations in NPSP, are used to track incoming funding into the organization. Opportunities are currently utilized for corporate gifts and program payments.
- **Payments**
- **Activities & Tasks**

Existing features that are not being used:
- **Leads**
- **Relationships**
- **Volunteer Job, Shift, and Hours**

4. Previous Email Marketing Questions Raised by Outside Vendors

RIF previously started to identify a new email marketing platform and ceased that work to align more appropriately with this comprehensive RFP. When investigating several potential new platforms, the questions below were posed and responded to.

Moosend Qs:

- **Implementation and Integration:**
  - **What level of support are you looking for here:** Complete comprehensive support. We do not have the resources/capacity in house to manage this. We have staff here to liaise and help provide needed information or take actions under your guidance AND we have a Salesforce configuration partner who can help shepherd that piece of the data sync but otherwise, will look to the vendor to oversee this process.
  - **Are you looking for the email vendor to do "hands-on-keyboard" work to set up your account and build integrations for you, or looking for support and/or training for these?** Yes, at first. We will not able to internally offer primary support for implementation and integration outside of Salesforce alignment with our configuration partner re: data sync. After initial set-up we can move to training.
- **Vendor maintains configuration and setup of email automation and underlying services**

- o **Similar question to above:**
- o **Are you looking for us to set up and design your organization's account for you, or are you referring to us maintaining the platform as a whole and being responsible for its performance and customer service?** Largely, we're looking for a turnkey, easy-to-use service. To the extent there is customization needed – of templates, reporting, etc. – we will look to the partner to provide guidance on how to go about this initially whether through actual customization or hands-on training, as defined together in the final scope of work.
- **Email Preference management**
  - o **What sort of preferences are you wanting to be able to offer here?** Comprehensive unsubscribe/opt-in management, one-step unsubscribe
- **Donation Forms:**
  - o **You mentioned being able to integrate with 3rd parties who offer this - do you have particular 3rd parties you prefer that we can confirm integration for you?** Question 1: do you all offer donation forms? If not, can you integrate with Engaging Networks' donation forms.
- **Integration with your platforms (Literacy Central, Literacy Network, Skybrary)**
  - o **Are these custom-built platforms you are looking for a custom-built API or are they hosted on some other platform we may have integrated with already?** The platforms allow a user to register, make purchases and manage account preferences. We need to be able to automate emails re: account management, payment method, subscription status/renewal for these groups of registered users
- **Pricing Metrics:**
  - o **I see you shared your expected contact records with us in the RFP, but was hoping you could offer a couple clarification points to get you an accurate proposal:**
    - ♣ **Of these 1.5 million contacts, are all of them "active" or is there a subset of that number who you are sending to (Active to us means not including unsubscribed, bounced, archived.)** They are not all currently active. We're undergoing a list pruning activity to remove inactives right now and believe that should shave the list down some, but we also have growth goals so would use 1.5M records as a baseline for now. Currently, both our marketing/engagement emails AND our donor appeal emails are sent through our current marketing automation vendor which also contributes to the large universe of records. We are currently scoping this RFP aligned to our marketing/engagement activities solely at the moment, which may further reduce the record number.
  - o **Could you please offer an estimate of the average monthly sending volume you expect to send?** Our monthly enewsletter goes to approximately 750,000 and represents the largest universe of senders at one time. We send 3-5 emails weekly to anywhere from 100-750,000 recipients.

Brevo Qs:

1. **What percentage of your current database is owned versus rented?** Around 20% come from an originally leased source but please refer to Addendum 1 issued May 15th: RIF does not intend to upload any leased contacts into the vendor's marketing automation platform. RIF will only upload contacts that have opted into email communications from RIF.

2. **Do the rented contacts opt in at any point to receive emails from RIF specifically? What is the process for rented contacts to enter your marketing database?** They will be warmed and opted in before entering the marketing database.
3. **What do your current open, clicks and unsubscribe metrics look like?** On average:

Open Rate: 31.36%
Click Rate: 2.01%
Unsub Rate: .17%

4. **What domain are you currently sending your marketing emails from?** RIF.org

Braze Q:

I'm curious if you can provide more insight as to what this "list rental" is / means to RIF? While RIF may lease a list on occasion, please refer to Addendum 1 issued May 15th: RIF does not intend to upload any leased contacts into the vendor's marketing automation platform. RIF will only upload contacts that have opted into email communications from RIF.

Hubspot Qs:

1. What is the current marketing automation platform RIF is using? Engaging Networks
2. How many users will need access to the new marketing automation platform? Approx. 8 RIF staff users
3. How many marketing contacts does RIF have in their current marketing automation platform? 1.5 million records are mentioned, as are 750K recipients of monthly email - is the latter considered the number of marketing contacts? They are not all currently active. We're undergoing a list pruning activity to remove inactives right now and believe that should shave the list down some but we also have growth goals so would use 1.5M records as a baseline for now. Currently, both our marketing/engagement emails AND our donor appeal emails are sent through our current marketing automation vendor which also contributes to the large universe of records. We are currently scoping this RFP aligned to our marketing/engagement activities solely at the moment, which may further reduce the record number.
4. What is the current volume of emails sent? Our monthly enewsletter goes to approximately 750,000 and represents the largest universe of senders at one time. We send 3-5 emails weekly to anywhere from 100-750,000 recipients.
5. Will vendors have the opportunity for a reverse demo or discovery call prior to the deadline for the proposal submission May 31, 2024?
6. What is the annual budget allotted for a new marketing automation platform? RIF is prepared to make an investment to best align our data, goals and efficiencies through a marketing automation platform. We intend to assess vendors based on their strongest alignment to the evaluation criteria within the RFP and are then prepared to explore the related budget and may need to scale up or down depending.
7. What is the budget for implementation and onboarding of a new solution? Same response as above.
8. Is it RIF's intention to replace the current solution, or is there a possibility of renewal for the current solution? We are evaluating the current solution and will only sign a contract for one new vendor (for the marketing side of the organization; the fundraising side of

the organization is also assessing their next steps and may or may not stay with the current solution but this RFP is focused on the marketing strategies).

9. What key stakeholders and decision makers will be involved in the final award resulting from this RFP? Alicia Levi, President & CEO, Jodi Rubin, Senior Vice President, Marketing & Partnerships, Jennifer Moone, Vice President, Marketing & Partnerships

10. Is RIF open to vendors submitting the proposal with a recommendation for a partner to lead the implementation and onboarding process? Yes- provided related expertise, services, and budget are included so we can evaluate a full picture. We would appreciate if there is more than one option to evaluate, if possible.

11. How detailed of a fee structure and cost proposal is expected? Further discovery and detailed understanding of the number of contacts, email send volume, integrations needed, user access needed, data transfer, data cleanliness, etc is all needed in order to provide an accurate quote for final costs. We anticipate this being a discussion to get to a final accurate quote and a cost that aligns to RIF's goals and needs. Please include core fee structure and additional schedule of any fees that may be incurred, with a clear indication of where there are costs that can be scaled up or down or additional considerations we may need to discuss to confirm pricing.

12. Is there any interest in consolidating the tech stack into a comprehensive CRM/Marketing solution? We plan to maintain our current tech stack.

Salesforce Qs:

- **What is text send volume?** Currently, the marketing side of the organization (the primary focus of this RFP) does not have a robust text message campaign strategy. We send on average to approx. 100 recipients monthly. We may seek to expand this. Our fundraising side of the organization has a robust strategy that sends 1- 3 messages to 33k+ recipients monthly and this optional inclusion is to determine if we consolidate their activities in this platform as well.