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 12.23.2024

Responses due by
5pm (EST) on Friday, January 10, 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.

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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.
   o **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.
   o **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:**
   o **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)
   o **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)
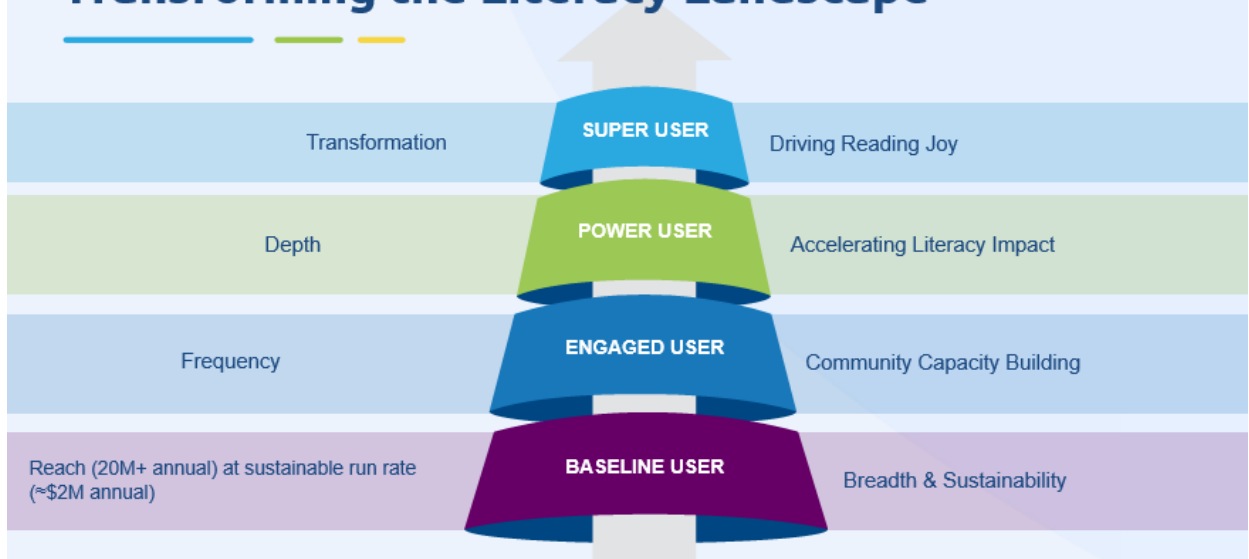
3. Project Vision:

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
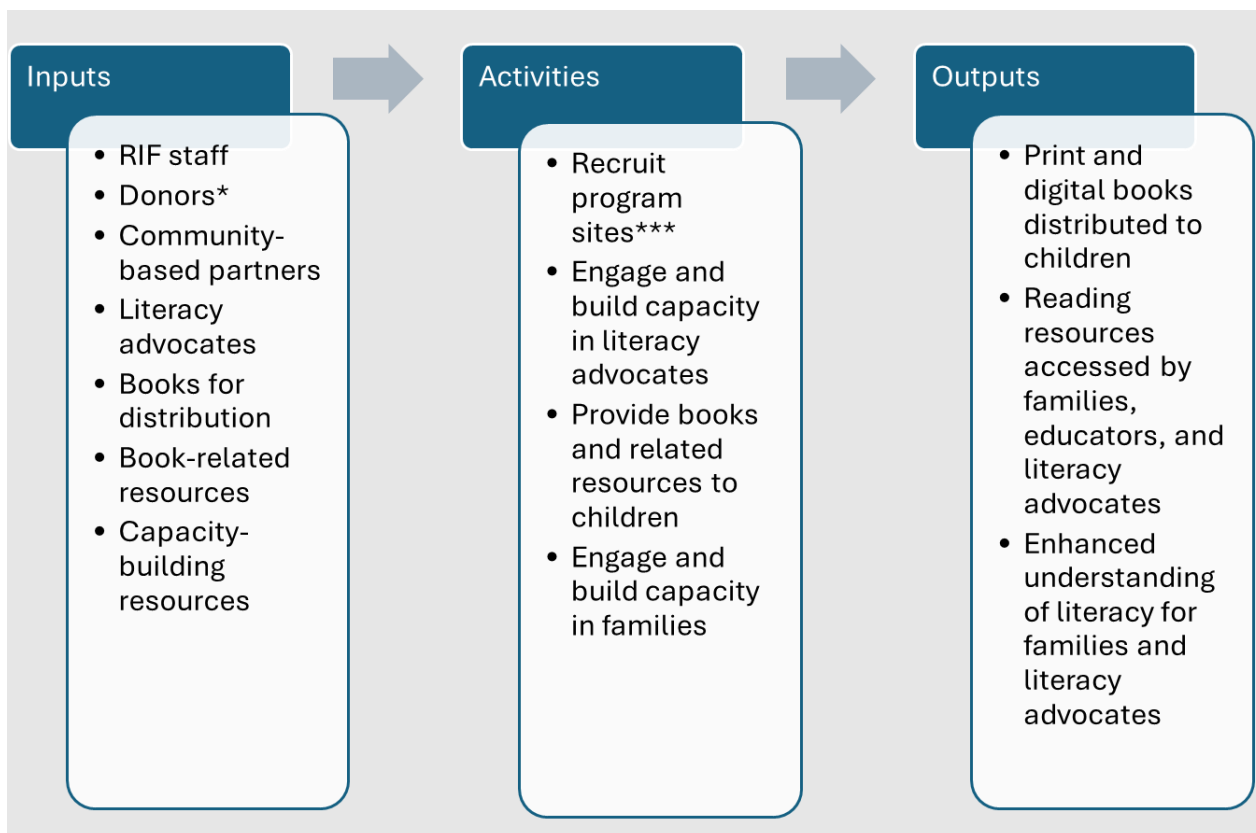- Now Gives Monthly $10 Gift

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, January 10, 2025. 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 23rd, 2024.

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	01/10/25
Short list of vendors determined and notified	01/27/25
Interviews with short listed vendors	01/28/25-02/05/25
Award notification	02/07/2025

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:
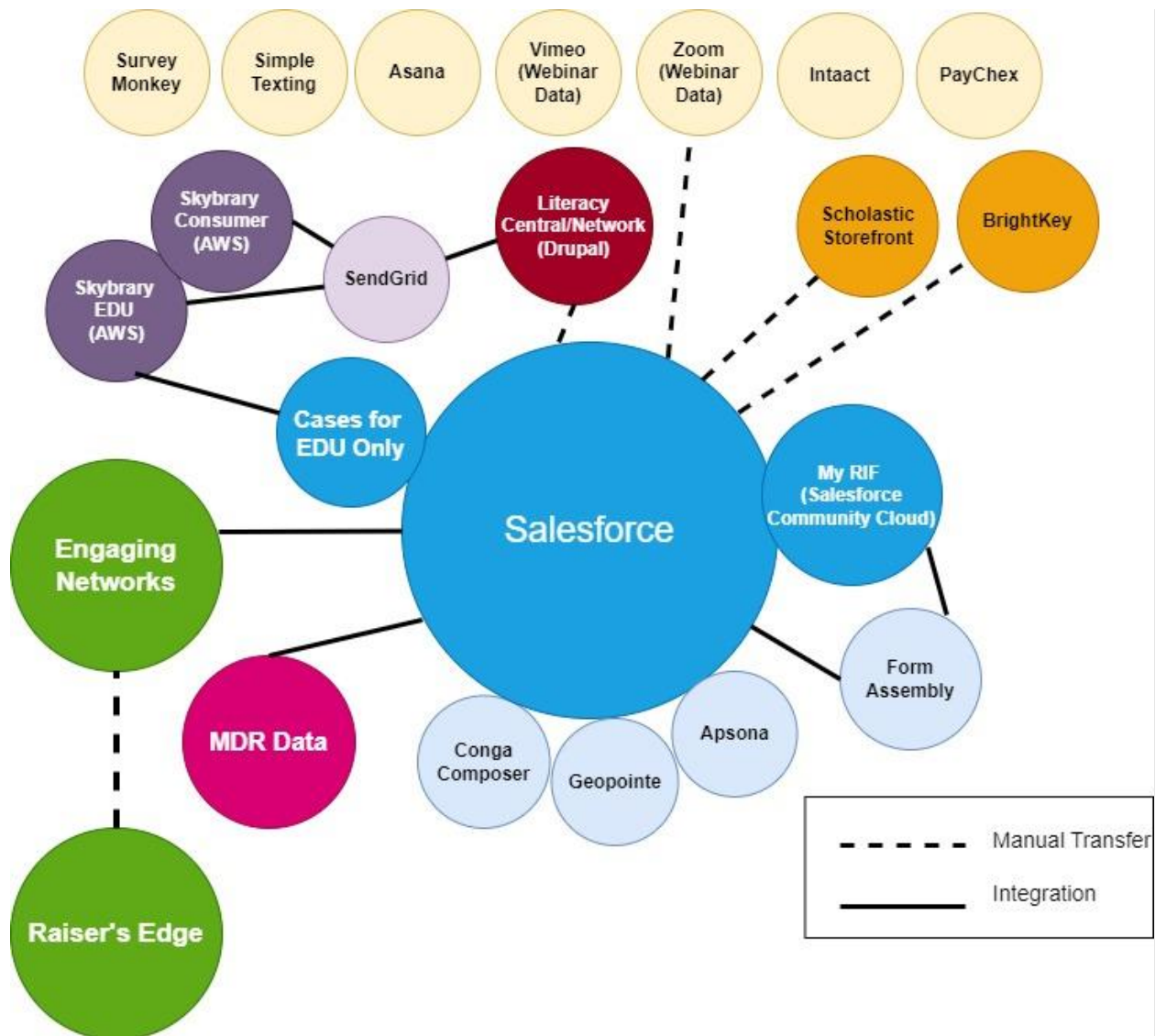
Application	Purpose	Usage
MDR	Third-party data and marketing partner that provides potential program site contact & demographic information. We also lease email lists from them.	Programs Team & Marketing Team

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 commonly used for donors or family engagement.	Marketing Team, Development Team
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
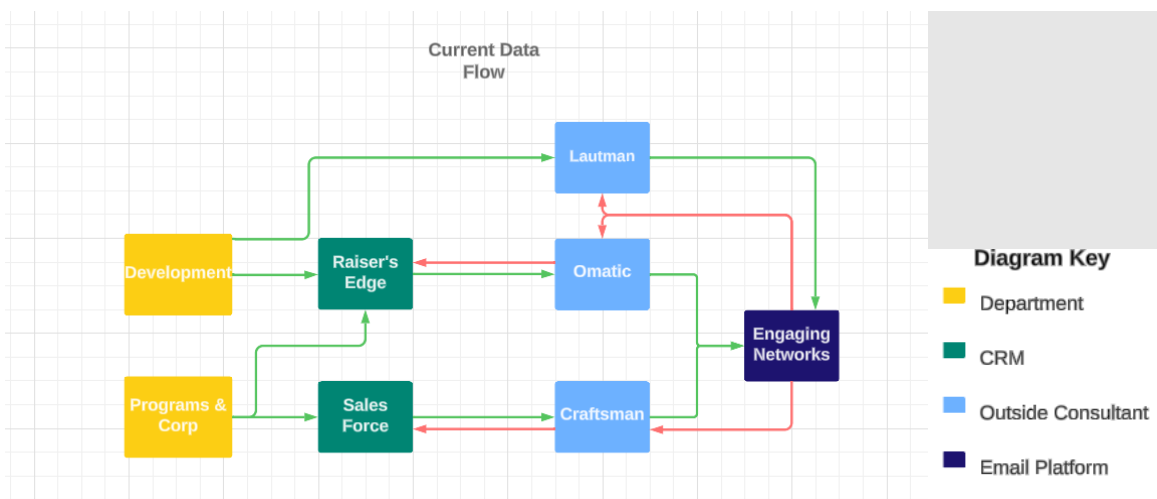
3. **Salesforce System Architecture**

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.

- o **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.

Official RFP Questions and Responses

- Q: Do you know if there is a specific budget in mind? And do you have an idea of the preferred timeline?
  - A: We expect this project to be a multi-year initiative that requires substantial investment. The most important factor for us is that we get the results we need without limiting ourselves to budget constraints. Ideally, we are looking to receive detailed costs for the road mapping phase and then an estimated range for the implementation costs, knowing that costs could fluctuate as we refine the scope of work. Our fiscal years run from October 1st – September 30th. Ideally, we will complete the road map phase, refine the scope of work, and begin some implementation by September 30, 2025.
- Q: Is RIF using Service Cloud for the Skybrary EDU ticket system?
  - A: No, RIF is only using Service Cloud for Skybrary consumer tickets
- Q: Has RIF customized their Salesforce system either through custom Apex code or workflows?
  - A: Yes, there are both custom Apex and workflows
  - There are 87 active Flows (46 from Managed packages), 5 active Process Builders
  - There are 2,789 Apex Classes, though only 42 are not part of a managed package
- Q: If so, it would be helpful to know the extent of the customization. Can you estimate the:
  - Number of custom objects?
    - A: There are 47 custom objects (excluding objects from installed managed packages)
    - There are 250 custom objects including those from installed managed packages
  - Number of custom apps?
    - A: 12
  - Number of custom tabs?
    - A: 44
- Q: The number of Lightning components:
  - Global Number?
  - App Builder Number?
  - Community Builder Number?
    - A: There are 8 custom Lightning Page components, 30 custom managed package Lightning Page Components, and 15 custom Experience Cloud (Community) components. Many of these are not in use
- Q: What are the timelines for the overall engagement, starting from the current state assessment to implementation and support? Are there any dependencies or external factors that could impact the project timeline?

- A: Our leadership hopes to complete this project as quickly as possible. However, we know that integration and migration of data takes time, and we need to get it right. That said, we would like to ensure that a substantial amount of implementation begins in our current fiscal year (ending September 30th, 2025). We are also about to embark on a major fundraising campaign which will likely necessitate that any changes to that team's tools and data be staggered first to optimize their results (must be completed prior to 2026).
- Q: As part of the RFP scope, is the current focus solely on discovery and assessment? Is the scope of the RFP defined in section 6 rather than section 5? Additionally, does the scope of the current RFP include only discovery and assessment, or does it also encompass implementation and support? If the latter, please note that the implementation would be dependent on the observations made during the assessment and the resulting roadmap.
  - A: The project scope is included in section 6 of the RFP. Section 5 just notes challenges to achieving the project scope. Ideally, we are looking to receive detailed costs for the road mapping phase and then an estimated range for the implementation costs, knowing that costs could fluctuate as we refine the scope of work.
- Q: What is the current status of identifying an email marketing platform? Does the RFP scope include making recommendations for the platform? If so, should we limit our recommendations to those already under consideration by RIF? What is expected in terms of the scope of work for a potential partner? Are there ongoing efforts to address domain reputation challenges?
  - A: We are still using Engaging Networks for the short term, but have plans to change the tool. We are looking to work with a marketing firm (final selection of vendors will take place in early 2025) to help us deploy emails within that Engaging Networks, but also help us identify a new email marketing tool. We imagine that the marketing vendor and selected vendor of this project will need to work together to make sure all implications to the data are considered in that tool selection. We have improved our reputation issues, and we are continuing monitoring services with our consultant, Email Industries, for at least the next 3 months.
- Q: Are you using Form Builder to create campaigns and generate inbound leads? If so, can you provide more details about the nature of the campaigns and lead volumes? Are tools like Simple Texting or SurveyMonkey being used to generate leads?

- o A: We initially started utilizing FormAssembly as a way to gather programmatic data from our existing implementers (annual activity reports, educator and family surveys, etc.). However, we have extended the use of the tool to grow our network with sweepstakes entries, donation request forms, matching grant applications, etc. SurveyMonkey does the same thing for us in collecting program data for research purposes. Simple Texting and is used as a family engagement tool to share timely free resources if someone opts in.
- Q: Who are the site implementers (e.g., My RIF – Community Cloud)?
  - o A: The majority of our site implementers are educators that have received a RIF program throughout the year. The rest are leads from a mix of non-profit partners and volunteer organizations. We launched the Community Cloud as a way for them to stay updated and informed on their program status, track open tasks and deliverables, and turn in activity reports. However, it is being underutilized, and the team has found it to be a burden versus a helpful tool.
- Q: Is there a plan to migrate data from Raiser's Edge and Engaging Networks to Salesforce (or any other platform recommended by the partner)? If so, what is the expected timeline for these migrations? Is the migration included in the current scope?
  - o A: I imagine that we would migrate from Raiser's Edge, but we are looking to be informed by a recommendation from this scope of work. Engaging Networks and Salesforce are currently synced around contact records so they information is in both systems. However, donation data is not yet in Salesforce nor are the engagement transactions that Engaging Networks records (the volume was way too high to sync to Salesforce at the time).
- Q: Does RIF segment customers based on current usage volumes, past business, or location analytics?
  - o A: The largest group in the RIF network is made up of programmatic contacts, then donors, then customers (those that purchase a RIF program). For programmatic needs, most of our segmentation has been based on location and needs to match directly to the funder's location. However, donors have been segmented by behavior while customers haven't been engaged much at all.
- Q: Is the plan to use MDR education data along with active contacts from the Legacy and Current CRMs?
  - o A: Yes, the plan is to continue to use MDR education data to obtain the demographic data points for legacy, current, and prospective contacts. We

do utilize MDR to lease names each year in hopes of converting them to programmatic contacts.

- Q: Is the goal to unify all data into a single system, or are you open to federated systems with synchronized data?
    - A: We are open to either scenario as long as the most important data is easily accessible so they we can achieve the goal of democratizing our data across RIF while also ensuring that our systems aren't overly complex and difficult to maintain. Contact records are the most critical record to make sure we have in a single system.
- Q: Are there any specific data systems or sources (e.g., Skybrary, Raiser's Edge) that are non-negotiable to retain?
    - A: We have invested a great deal into Salesforce over the last few years so I can't imagine we would want to move away from that system. Also, we are investing in upgrades to the Skybrary system this current year so we won't be able to walk away from those systems either. All others are up for a discussion.
- Q: What level of granularity is required for user segmentation? For example, should segments consider user location, program participation, or engagement behavior?
    - A: All 3 of those areas will be important for segmentation moving forward. We have focused on the first two, but really need help diving into engagement behavior.
- Q: How critical is real-time data syncing across platforms versus scheduled updates?
    - A: Scheduled updates would likely be fine for most cases. However, when it comes to revenue and donation data, we look at that as best in real time as possible.
- Q: What are the different types of structured and unstructured data in consideration? In the RIF Data sources (appendix), there is mention of sources like YouTube, Vimeo, etc.
    - A: Most, if not all, RIF data is structured data that just requires manual manipulation to be imported into our systems. For example, we download reports from Zoom webinar that list all the names and emails of contacts that either registered and/or attended a specific webinar. We then upload that information to create or append their record in Salesforce to make note of that engagement touch point. Other types of data that are not related to a contact would be usage data on digital content such as views on Vimeo or YouTube videos, pageviews for specific content on the website, etc.
- Q: Can you share the size of the databases if available?

- o A: Our total contact record file is close to 1.5 million records
- Q: The RFP mentions Salesforce as highly customized and partially adopted, with Raiser's Edge housing donor data. Are you open to fully transitioning to Salesforce as your primary database, or is it important to you to maintain a separate platform for donor data?
  - o A: We are open to transitioning everything to Salesforce, but we have no preconceived notions of what data integration/migration should look like.
- Q: Many of your data systems, such as Salesforce, Engaging Networks, and SendGrid, involve manual imports and siloed workflows. Are there specific processes or integrations you'd like automated first to address inefficiencies or data inconsistencies?
  - o A: While the majority of our contacts are housed within Salesforce, there are still a good chunk stored only in Skybrary and a small amount in just Raiser's edge (those that are not online donors). The first priority would be to make sure we have a process to get all contacts into a single system. We are most concerned with the Skybrary contacts though so we can make sure they are included in a consistent and cohesive engagement strategy.
- Q: You emphasized a need for a 360-degree view of users and mention overlaps in educator, donor, and family segments. Do you have a vision of what this unified view would allow you to do that you can't do today?
  - o A: Right now, we are very prescriptive on how individuals come into the RIF system and how we engage with them as a result. Ideally, we'd like to get more sophisticated to let them tell us what they are interested in and how they want us to interact with them (what we see as behavior-based engagement). Right now, we can't easily tell if someone is a donor, program implementer, Skybrary user, literacy central user, webinar attendee, etc. We would have to look in different places for that information which is not scalable for us. Earlier this year, we were tasked with identifying RIF "super users" across that US that would be great spokespeople for the organization. However, without having any way to measure all the different touch points and engagements, it took days of manual data manipulation to try to come up with a rudimentary way to find individuals that met the need. We would like to be able to do that by running a simple report.
- Q: With ~750,000 active contacts and ~3 million total records, what specific KPIs do you prioritize for engagement (e.g., email open rates, participation in programs like Rally to Read)? How would you like these metrics visualized for easier analysis?
  - o A: We are open to new ideas, but so far, we have thought about creating a way to quantify the different engagement touchpoints to create a user score for each individual. See below for some segments we have started to think about:

SUPER USERS - EDUCATORS <u>DRIVING</u> JOY: NOTES:

Defined Actions

	NOTES
Educators that have provided RIF books to their students to take home three (3) or more times (BFO, RFS, Book Fund, or Rostering Students in Skybrary)	
AND have attended at least three (3) Webinars or RIF activities in the current school year	
AND have participated in ALL RIF Campaigns (Rally to Read Pledge, Summer Reading Pledge, Summer read alouds, donor engagement etc.) in the current school year	
AND have initiated access to RIF resources by creating a login (Literacy Central, Literacy Network, Skybrary)	
*IF Skybrary, has renewed for a minimum of 3 years for EDU and 2 years for consumer	
AND have completed activity reports or responded to surveys	Maybe give option to add email address
AND supported family engagement - either received family survey responses or had families sign up for text messages	What about Skybrary parent emails?
AND utilize RIF resources regularly in the classroom (weekly)	Can't currently track - would like to identify frequency measure in future
OPTIONAL: refer additional educators to join the funnel	Can't currently track - would like to identify referral mechanism for the future

POWER USERS - EDUCATORS <u>INITIATING</u> PRACTICES THAT CAN LEAD TO JOY:

Defined Actions

	NOTES
Educators that have provided RIF books to their students to take home (BFO, RFS, Book Fund, or Rostering Students in Skybrary)	
AND have attended at least one (1) Webinar or RIF activity in the current school year	
AND have participated in a RIF Campaign (Rally to Read Pledge, Summer Reading Pledge, Summer read alouds, donor engagement, etc.) in the current school year	
AND have initiated access to RIF resources (Literacy Central Login, Literacy Network Login, Skybrary, RIF Newsletter Sign Up)	
*IF Skybrary, converted from a free trial to a paid customer or grant recipient and utilized for 1 year	
AND utilize RIF resources regularly in the classroom (monthly)	Can't currently track - would like to identify frequency measure in future
OR have an immediate affinity for RIF that presents itself during first engagement	Need to develop tag in the system

ENGAGED USERS - EDUCATORS <u>ENGAGED</u> IN LITERACY <u>WITH RIF</u>:

Defined Actions

Educators that have attended at least one (1) Webinar or RIF activity
OR have participated in a RIF Campaign (Rally to Read Sweeps, Summer Reading Pledge, Summer Read Alouds, Donor Engagement, etc.)
OR have initiated access to RIF resources (Literacy Central Login, Literacy Network Login, Skybrary Free Trial, RIF Newsletter Sign Up)
*IF Skybrary, initiated a free trial of consumer or EDU
OR have reached out to RIF for support/resources (contact us or program outreach form - added to waitlist)

BASELINE USERS - EDUCATORS ENGAGED IN LITERACY:

Defined Actions

Educators that have opened emails
AND have clicked through to a specific content item
OR, IF Skybrary, clicked to start an account but did not continue with order for a free trial or a purchase

- Q: Based on the listed tools (Quicksight, Salesforce, spreadsheets), how satisfied are you with the current reporting cadence and accessibility? Are there specific pain points around insights or ease of access you'd like addressed?
  - A: The biggest pain point is that the different data for a specific user could be in multiple places with no current ability to have a compressive view on how a single individual interacts with us. That limitation makes it very difficult to cultivate super users/literacy advocates. Also, all of our organizational metrics are manually entered into a spreadsheet every month and it seems there has to be a better way to capture and display data. Ideally, I would love to pull a report from Salesforce, but the way we have our programs set up, I can't easily fit them into the reporting categories I need (the system is too rigid while our organization likes to be more flexible).
- Q: What reporting are you routinely sharing with leadership and priority individuals? Do those reports include definitions of the data that is being reported on? How do these reports differ between departments, and do they overlap at all?
  - A: This is a draft of the leadership dashboard we will use this year:

RIF LEADERSHIP DASHBOARD
31-Dec-24

Reading Is Fundamental.

Children

Programs	Actual	Goal	Variance
BFO			
Skybrary			
Read For Success			
Engagement			
Rally To Read			
Summer Reading			
Total Programs			
Advocate engagement			
Total			

Revenue

	Actual	Goal	Variance
Campaign			%
Renewals			
Special Accounts			
New Business			
Foundations			
Government			
Individual			
Total	$0	$0	0%

Advocates

	New			Total			
	Actual	Goal	Variance	Actual	Goal	Variance	Variance
New Donors							
Enews signup							
LN/LC signups							
Webinar registrants							
Social Media Followers							
MDR Conversions							
New Skybrary Consumers							
Community Volunteers							
LC/LN/RTR/Skybrary Digital Users							
Total New Advocates				*program sites * 3 volunteers*			

Program Sites

	Current Year	Prior Year	Variance
BFO			
RFS			
Skybrary			
LC/LN Users			
Educator News			
Total			

Books & Resources

	Current Year	Prior Year	Variance
BFO			
RFS			
Skybrary Books			
Skybrary Videos Viewed			
Skybrary Events			
LC/LN Events			
Total			

Generally, for priority individuals, we create something personalized based on existing frameworks. Namely, the Programs Department publishes a monthly impact report and different teams may pull from that to create materials for their specific purposes. For example, the Marketing team might pull a quote to add to the website or the Development team might share an announcement with a funding prospect as a re-engagement touch point. Here is a sample of that impact report:

Reading Is Fundamental
Impact Report

Reading Is Fundamental.
until every child reads

HIGHLIGHTS

43,129 Books Distributed

120 of Book Celebration Events

212 Matching Grant Applications Received

WEBINAR REGISTRATIONS

436 EDUCATORS
Every Educator Counts
Feb 15 - *Using funds of knowledge approaches to bridge home and school literacies*

189 FAMILIES
Every Family Counts
Feb 28 - *Family literacy practices to support children birth – age 5*

STUDENT STORIES

"One of our kinder teachers told me yesterday that a student who "never reads" has read 10 books at home since he received his Skybrary account. Thank you for all that you do!"
- RIF District Liaison from Gulfport Public Schools

"A Kinder Asst. just told me ALL students went home and took their RIF books out of their backpacks. One student stated he and his dad read a book at bedtime!!!!! You are doing GREAT things for our students!!!!"
- Rachel C., West Elementary

EDUCATOR EXPERIENCE

"The biggest benefit of the RIF program is the fact that they could take the books home to keep and to share with their grownups. I think that this fosters a sense of ownership of reading and strengthens family bonds which makes students more likely to associate reading with positive feelings and memories."
- RIF Program Implementer at Believe in Books Literacy Foundation

MISSION MOMENT

Club RIF, consisting of Chaparrel high school student volunteers, has been supporting children in the greater Phoenix area for over 30 years. On February 26th, Club RIF hosted a small book celebration event at Yavapai Elementary, a Title I school. Fifteen children were able to receive 2 books each, participate in face painting, coloring their own bookmarks, and getting a meet n' greet with Clifford the Big Red Dog.

KEY INITIATIVES

RIF & Highlights magazine partnered together to provide 15,000 free copies of the February edition on online safety to students across the country.

GEICO employees assembled literacy kits for their Martin Luther King Jr. Day of Service activities. The 1,300 completed kits were distributed to students in February.

RIF was featured as 1 of 15 top literacy nonprofits by We Are Teachers in their guide to Top Education nonprofits and charities. We are Teachers is a community of 3 million educators that share timely resources and support for use in their classrooms. Link:
https://www.weareteachers.com/education-nonprofits/#literacy

TOP BOOKS

Top Print Books (bookstore)
1. One Is a Piñata
2. Stuart Little
3. I Promise
4. Good Kind of Trouble, A
5. Flat Stanley

Top Skybrary Books
1. NG Readers: Titanic
2. NG Readers: Sharks
3. Snow While and the Seven Trolls
4. Dinosaurs
5. NG Readers: Volcanoes

TOP DIGITAL RESOURCES

Literacy Central and Literacy Network
1. /Literacy-central/search
2. /Literacy-central/leveled-reading-passages
3. /Literacy-network/matching-grant
4. /Literacy-central/reading-experience/leveled-reading-passage-top-10-countdown-Africa's-most-deadly-0
5. /Literacy-central

Skybrary for School
1. Skybrary-school-teachers-template.csv
2. Curriculum/ 2-3 /Deserts to rainforests.pdf
3. Curriculums/k-1/list of units.pdf
4. Curriculums/ k-1/out of this world planets moon stars & sun.pdf
5. Skybrary-treasurehunt-v2.pdf

Skybrary Videos
1. Chocolate plantation
2. LeVar joins the circus
3. Medieval Times
4. Titanic
5. Chinese new year

- Q: You noted that UTM parameters and tracking are inconsistently used across platforms. What challenges have you encountered in standardizing tracking, and are there priority campaigns where this should be addressed first?
  - A: We don't have any detailed internal expertise on tracking so we're always uncovering things that were missed or should have been looked at a different way. Our key campaigns are Rally to Read, Summer Reading, Back to School, and we have occasionally done custom partnerships that require detailed tracking like our partnership with Trane around our digital Sustainable Futures Center: https://www.rif.org/literacy-central/sustainable-futures. The pain around the custom projects is that the team has to put every single website link into a spreadsheet for them to be able to track the impact against the traffic to all the

resources within the center. Another perplexing example is that our emails are designed to drive traffic to our websites, yet when we had the inability to send emails for a period of time, traffic didn't dip. Overall, we want to easily be able to know and see that our efforts to drive engagement are achieving the desired results.

- Q: Beyond achieving internal efficiency and segmentation improvements, are there specific growth metrics (e.g., educator engagement, donor retention) you see as the most immediate indicators of success?
    - A: At the end of this project, we want to be able to segment our educator audience (potentially creating a scoring system), to be able to show and measure increased/deepened engagement over time.
- Q: Beyond email deliverability and list management, are there any additional conversion pain points you'd like prioritized (specific website actions, Skybrary subscriptions)?
    - A: Due to the limitations of Engaging Networks and the sync to Salesforce, we have not been able to utilize the lead functionality of Salesforce. Since we lease a considerable amount of data through MDR, it would have been ideal to see prospects vs. Actual accounts so we are continually have to deal with workarounds as a result. There is no easy way for me to see that in our systems and takes a very complicated report pull from Engaging Networks. We have also been working on a way to get Skybrary subscriptions into Salesforce as it would be ideal for my team to see those that had been granted a subscription and the layers within (activated it, rostered their students on it, etc.), but that work has been on pause for a bit.
- Q: What in terms of your technology is working well? Any specific platforms?
    - A: For the most part, Salesforce is doing its job for program implementation and account management. The challenge is getting the team to use the system consistently for reliable outcomes. The team also seems to really love Asana for project management which is a big part of our work (we manage each restricted funding initiative as a project). The system does the work and does it well, but we need continual trainings and reminders on workflows to get the consistent results.
- Q: How proficient is your staff regarding the technology platforms you use? Are staff certified in certain technologies? Any training needs?
    - A: This is one of our biggest pain points. Aside from Asana, it feels like we need expertise in certain technologies to make any real headways and we want to move away from that. For example, we have a database person that is focused on managing Raiser's Edge. We have felt that we needed someone specific to focus on Salesforce and the same for Engaging Networks. Given we have an overall headcount of less than 40, that's just not feasible to build that level of expertise. We outsource when possible, but we need our technology to be user-friendly and intuitive. The team has talked in great lengths about creating training modules on Salesforce and we might need that type of support.
- Q: What manual tasks is your team spending time on now that you might be interested in automating?

- A: Most everything requires a manual data upload which takes time for our staff and consultants that support it. For example, even contacts that sign up for Literacy Network, technically flow directly into Salesforce and then sync to Engaging Networks for communications. However, to make sure they get added to the specific email lists, someone has to manually update the records in Engaging Networks once a week. Nothing is seamless, everything has manual touch points.

- Q: Are there any platform changes, migrations, integrations, or other related activities on your roadmap for the upcoming year?
  - A: As mentioned in a different question, we are looking to shift away from Engaging Networks and will work collaboratively with the various vendors to make sure we identify to best tool to meet all requirements (for data implications of this project and tactical email deployment needs). However, we are also investing a considerable amount in updating and enhancing the Skybrary user experience this year. We don't believe that that underlying technology will shift though, but the fields in the Skybrary database may get updated.

- Q: What data security platforms and precautions do you have in place?
  - A: Our internal systems like Microsoft and Salesforce require multi-factor authentication. We do regular internal training on best practices around IT security. However, our biggest challenge currently is in working with school districts and adhering to their privacy policies that require us to think differently about the student and educator data related to PII. Currently, Skybrary and our Literacy Tracker tool are the only places that capture student data, and we are undergoing efforts to de-identify student data including first name, last name, gender, and age. We haven't addressed it holistically yet though and need that to be contemplated in this process.

- Q: How are your platforms currently speaking to each other? Have you primarily been utilizing native integrations to the platforms, or have you worked with consultants to build custom connections between platforms?
  - A: For the platforms that are synced, we have used native integration.

- Q: In thinking about donor management and marketing systems, what work has been done to date around defining donor profiles? Additionally, are there any metrics or other data points outside of typical giving data that RIF utilizes to gauge donor interest or propensity to further engage with RIF?
  - A: We currently work with a consultant that supports our donor program, and they have well defined goals, profiles, strategies, and tactics. We have not built out the same level of sophistication on our marketing side – there is quite a bit of catching up to do. The need is less around donors and more around thinking about our massive educator network that benefits from and utilizes our free resources.

- Q: Does RIF anticipate the review of the email records to support deliverability to be concluded prior to the start of the data work? If so, will the awardee have access to the refined email list?
    - A: Yes, the deliverability work has concluded. We are still cleaning up the data now and some of that will be dependent on this project. Namely, we do not have a way to archive and store old data as we do not yet have a data warehouse.
- Q: How does outreach to donors and funders typically happen?
    - A: We have various channels for outreach and solicitation including direct mail, email, online giving, etc. We focus on stewardship and relationship building in our cultivation work. For large funders and corporate partners, outreach primarily takes place via email, but it could also take place via LinkedIn outreach, phone call, and even mailings.
- Q: How are donors categorized at RIF and what does a typical donor journey look like for each of those categories?
    - A: As mentioned in another question, we have a consultant that supports our donor journey and we are less concerned about that for this project. We need help creating a user journey for our educator network and literacy advocates.
- Q: Is RIF looking for automated program emails to capture information such as open and click rates?
    - A: Open and click rates are critical for us as well as understand the intersection with driving website traffic. However, we are likely bringing on a separate consultant to manage email deployment so I imagine that will wrap into their scope of work versus this one. We will want to make sure that strategies work towards a common goal though.
- Q: What are the ongoing operational budget expectations around any systems and what, if any, staffing considerations are there for ongoing maintenance and governance?
    - A: RIF expects that our operational budget around systems will increase, but need to be realistic for a small non-profit to maintain. We also expect this project to inform potential staff realignments in order to provide ongoing support and optimization of workflows. Ideally, we don't want to have to expand staff as a result, but instead for the technology to create efficiencies.
- Q: What is RIF's current risk tolerance for data? Is RIF storing any sensitive data beyond name, email address, etc.?
    - A: We are a risk-averse organization, and do not have a strong desire to store sensitive PII beyond needs for research projects. However, even in research projects, we typically consult with a research firm that gathers and analyzes

the data versus RIF having to store anything. We are working on creating policies around PII though to provide additional clarity.

- Q: Is RIF looking for content creation for digital marketing or configuration of a marketing path of automated processes where content can be added in?
  - A: We are curious about this question and what's possible, but that likely seems more in scope for our marketing consultant that are being brought onboard to handle email marketing.
- Q: Do we need to include the migration from Raisers Edge in the RFP submission? If yes, what is your Raisers Edge contract renewal date?
  - A: First, we are looking to receive a recommendation around our systems, including the donor data in Raiser's Edge before deciding to migrate the data.
- Q: Are you looking to replace both Engaging Networks and Sendgrid?
  - A: Definitely looking to replace Engaging Networks, but we're less sure about Sendgrid. We are looking for a recommendation.
- Q: Do you anticipate leveraging Salesforce Nonprofit Cloud (NPC) features for this project, or are you committed to continuing with the current Nonprofit Success Pack (NPSP)? If not decided, would you like an overview of transitioning to NPC versus enhancing the current NPSP setup?
  - A: We'd look for the vendor of this project to make a recommendation and to clearly outline why we should switch and what the implications would be as we do not have the internal expertise to make that decision.
- Q: Are there deliverables that you consider "must-haves" versus "nice-to-haves"?
  - A: Contact records must be captured in a single database to make sure we have consistent engagement strategies and tactics aligned., including the ability for the system to create an engagement score based on RIF criteria (different from a marketing engagement score that would be based on email clicks, open rates, etc.). We have to be able to see and segment communications based on the various touchpoints that individuals have with RIF. However, we know that some data probably doesn't need to be in a single system (ex: financial data, website analytics), but we'd like someone to help us Zoom out and identify what is truly important to our objectives to make sure we aren't missing anything.
- Q: Are there any deadlines or organizational events that this implementation must align with?
  - A: We are undertaking a large fundraising initiative in 2026 so we will likely need to stagger any development/donor data transitions at the very start of the roadmap.

- Q: Are there existing audience segments or lists that need to be maintained or redefined during this project?
    - A: Our donor program seems to be working well so we will likely look to maintain that, but we are open to refining segments and creating greater clarity as we move forward. For example, we have had several discussions over the last year or so about who is a donor prospect versus programmatic contact based on entry points into the RIF networks and we could use a fresh set of eyes on our assumptions.
- Q: Raiser's Edge questions
    - How long you have used Raiser's Edge?
        - Since 1999
    - Have you moved to NXT?
        - We currently use NXT Web for certain functionality and Database View for other functionality, because it is not (yet) available in NXT Web. For example, we use the Events module in NXT Web, and we use the mapping capability (geographic view of where donors live) in NXT Web. But we do all of our batch import and export processes as well as Global Changes and Deletes from Database View.
    - Are you currently using or have you used packages in Raiser's Edge?
        - I'm not 100% sure what this is referring to, but we mark some of our gift records with package codes. Our direct mail appeals and acquisition mailings all use package codes; we have a Campaign/Fund/Appeal/Package coding structure that we use in RE.
    - Have you used any of the following modules/features in Raiser's Edge? If so are you currently using them?
        - Membership module
            - No
        - Volunteer module
            - No
        - Tribute module
            - We have used tribute record functionality, but not the tribute module.
        - Event module
            - Yes, we have used the Events module, including setting up a donation form, in NXT Web.
        - Attachments/media
            - Yes, we routinely add attachments/media for select acknowledgements and correspondence.

- Planned Giving module
  - No
- Search/Prospect Research
  - If this is a separate module, then no. We upload prospect research documents and wealth screening scores to the constituent record.
- How many different gift types have you used in Raiser's Edge?
  - Our current most frequently used gift types are Cash, Pay-Cash (for pledge payments), Stock/Property, and Pledge. We also have active gift types for Gift-in-kind, Other, and Recurring Gift, but I've never used those. (All of our recurring gifts are classified as gift type = Cash.)
- Do you split gifts
  - Yes, we do sometimes, for example, Workplace Giving / Matching Gift.
- Do you rely heavily on queries in Raiser's Edge?
  - Yes, heavily. We use them (sometimes together with Exports) for information-gathering, reporting, and exporting information for vendors.
- To what extent have you used custom attributes on the following, Constituents, Gifts, Campaigns, and Appeals?
  - We have a large number of custom attributes on Constituents and a smaller number on Gifts. We do not have any on Campaigns or Appeals.

- Q: Could you provide more detail on how your team currently leverages Sprout Social?
  - It is used to monitor the performance of our social media campaigns. Given that most social media activity does not tie back to individual engagement that we can capture in a meaningful way, it is listed for awareness, but likely not a part of this project unless we are missing something.
- Q: Are any of your teams using Slack in workflow processes? If yes are there specific features or workflows within Slack that your team relies on most?
  - A: No, the team mainly use Slack for internal communication.
- Q: How many email messages do you expect to send from your Engagement solution on average per month and per year? (Judging by the details in the RFP, I've estimated ~ 15.28 Million on average per month, and 183.36 Million annually. Does this seem like a good estimate?)
  - A: Yes, that is an accurate estimate.
- Q: How many different email domains and subdomains do you plan to send emails from? Please list them all. (E.g., rif.org, skybrary.org, rallytoread.org)

- o A: We currently use RIF.org and Skybrary.org. We plan to add an additional domain for cold marketing such as JoinRIF.org, but we have not implemented that infrastructure yet.
- Q: Our assessment will analyze capabilities across the entire CX stack. Based on the RFP, the technologies outlined fall mainly into the data and orchestration technologies. Can you confirm that Reading is Fundamental is looking for a holistic assessment of the full CX stack? Inclusive of capabilities like content, commerce, advertising, etc.
  - o A: Yes, we are looking for a holistic assessment and consolidated approach to help move our work forward in a more cohesive manner.
- Q: What is the biggest challenge when it comes to your marketing technology stack? (ex: tools are not integrated, lacking data, missing functionality, etc.)
  - o A: We need to be able to send emails based on engagement and while new functionality is being released all the time, we don't often have the bandwidth to take advantage of the features. Most recently, we realized we need to segment emails based on opens within the last 30 days, but could not do that in Engaging Networks. We also need to be able to get more sophisticated in understanding what messages around content resonate with specific users and be able to provide them more of the same – right now we have a one size fits all approach. I've heard many times that the ability to run queries and segment people is the biggest challenge. We also need a better integration with Salesforce
- Q: Do you have any solid dates or deadlines for contract renewals that we need to be aware of that could impact decisioning?
  - o A: Engaging Networks renews in March, but we can't imagine moving away from it that quickly. Likely, some of these systems will have to run on parallel paths for a bit.
- Q: What is your 3-5 year marketing strategic vision and what short-term goals are in place to support it?
  - o A: Here is the current strategic plan that we are operating against as an organization: https://www.rif.org/sites/default/files/documents/2023/10/02/3%20Year%20Strategic%20Plan%20Infographic%202022%20%281%29.pdf

    Here are their current goals for this fiscal year:

    Strategy/Awareness
    1. Develop a 60th Anniversary strategy/plan for 2026 execution to elevate brand awareness and drive revenue.
    2. Support the Comprehensive Campaign's marketing by providing brand oversight across assets.
    3. Support updated Skybrary product strategy including brand alignment and communication.

    Engagement

1. Develop and execute marketing strategy to increase individuals entering the donor funnel to support long-term revenue goals.
2. Work in partnership with the Content & Programs teams to support RIF's reach across core audiences and maintain target penetration levels.
3. Broaden and deepen engagement with individual literacy advocates.

Operations

1. Advance RIF's data integrity, alignment, and systems by serving as a key stakeholder in creating a comprehensive data solution to elevate our marketing efforts.
2. Optimize the strategic and tactical implementation of all RIF core functional areas' marketing needs and execute all baseline operations.

- Q: Can you describe and share your customer segmentation strategy?
  - A: We have a one size fits all approach on the marketing and awareness side of the organization, which is where we need the most time and attention. Mostly, people are grouped by what program they are implementing: Books for Ownership, Read for Success, Skybrary, or general educator emails. What that means is that they could receive an abundance of communications from RIF is they are involved in every program. We have not yet figured out a more personalized approach such as thinking about grade levels or thematic interests, etc.
- Q: Data accuracy is a general concern (i.e., duplicate and incomplete records). Apart from the current list pruning of inactive contacts, what contact data hygiene and standardization practices are in place?
  - A: We don't have a full-proof process in place due to all the disparate systems. However, when it comes to adding names to Salesforce and syncing to Engaging Networks, we utilize Apsona to attempt to append data versus creating a new contact if the email address already exists in the system. The connection between Engaging Networks and Salesforce makes it complicated to locate and merge duplicates though.
- Q: Do you have a universal, unique, and persistent contact ID across teams and systems? What other IDs exist in your internal ecosystem to identify or match contact records?
  - A: We primarily use the Salesforce contact and account IDs to match records across systems. We also have a RIF account ID that is autogenerated in Salesforce that Scholastic uses to note program sites for online bookstore accounts they create and maintain.
- Q: How is an "official" or active contact defined (compared to a prospect or inactive contact)? What event(s) dictates that?
  - A: Generally, until this most recent data clean up, we would keep any contact in our system no matter the length of time they had been inactive. However, we are shifting to more updated parameters and have landed around the idea of anyone that has engaged with us within the last year is active (made a donation, opened an email,

implemented a program, participated in a virtual or in person event). The rest would be considered inactive. What we don't yet have is a way to archive contacts that become inactive.

- Q: How are the leased lists used (i.e. data enrichment, modeling, one-time communications)? What information is provided with each contact record?
  - o A: We lease contact data and corresponding institutional data. The contact data most appliable is name, title, and email address which is utilized to grow our "house file". The goal is to get people reading our programmatic email series and utilizing our content (all free). The institutional data provides the deeper demographic information such as Title I school, percentage of students participating in free and reduced-price lunch, etc. We utilize this data to tell our impact story of those utilizing on content or participating in RIF programs.
- Q: Is this engagement focused on the US or is this a global assessment?
  - o A: We are a US based non-profit only.
- Q: What is the estimated start date for this engagement?
  - o A: We are looking to begin discovery sessions at the end of January/early February.
- Q: As a part of this first phase being discovery, are you hoping to have "user story" level detail and an output?
  - o A: We believe that would be helpful to create a clear guidepost of where the project is going, but it is not required that it occurs during discovery.
- Q: Can you unpack what you are hoping for around the training and knowledge transfer scope that is called out? I ask as generally speaking, a training plan would be developed as a part of this discovery and so that would be an output of this first phase. Until we define what the first phase of implementation looks like, it's tough for us to define what training / upskilling has to be done until we set those priorities together.
  - o A: We've had a lot of change over the years at RIF and we just want to make sure that any vendor we bring on contemplates that need to bring internal stakeholders along the journey in a meaningful way to build buy in and navigate change management successfully.
- Q: The RFP selection weighting section calls out "timeline and implementation plan" - as the actual implementation is an output of the discovery, are you referring to the discovery timeline?
  - o A: We'd like a detailed plan for the discovery timeline and then a rough estimate for implementation. We know that it will ultimately depend on the scope of refinements that come out during discovery, but we'd like a rough assessment of what's possible (ex: is this an 18-month initiative or 3-year roll out?)