REQUEST FOR PROPOSAL

Customer Relationship Management System

August 1, 2013

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1. SUMMARY

The Downtown Denver Partnership, Inc. (PARTNERSHIP) is accepting proposals to develop a new Customer Relationship Management System (CRM) for Membership Services. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged. Proposals are due at the PARTNERSHIP office by 5:00 pm Monday, August 26, 2013. Evaluation, interview, and selection will start on August 27, 2013. Selection will occur on September 16, 2013 with work to start shortly thereafter. The project should be completed and tested by November 11, 2013.

The PARTNERSHIP currently uses iMIS as its CRM which is no longer able to effectively manage the amount of information we need to capture within a company-wide CRM. iMIS has clear inefficiencies in reporting tools, customer management, sales tracking, event registration, financial management, backup, technical support, and cost control.

The PARTNERSHIP also uses many other tools to drive traffic and increase member engagement, which include:

- Emma (email communication tool)
- Salesforce (member sales management)
- Survey Monkey (research and survey tool)
- PARTNERSHIP website (needs to be able to communicate with CRM)
- eTouches (event management)

The PARTNERSHIP wants to “start over” with a new system that uses the best components from existing tools, while creating a streamlined, user-friendly CRM for the entire staff to utilize. The PARTNERSHIP expects that a new CRM will lead to new opportunities for member engagement and increased sales opportunities through better member tracking and a better system for event and financial management.

We expect to negotiate a final scope of tasks with the selected candidate once a final strategy is in place.
This RFP is for design and development of the CRM and for one year of technical support and maintenance. However, it is the PARTNERSHIP’s intention to work with the selected candidate as an ongoing partner for future work, support and maintenance.

A successful candidate to this RFP will have demonstrated proficiency, experience and creativity as a CRM designer, developer and programmer; a thoughtful plan and strategy for developing and then transitioning to this new CRM; a plan for enhancements as budget allows; administration implementation that makes it easy for non-technical PARTNERSHIP staff to update the CRM; understanding of IT needs and solutions related to the CRM; an understanding of cost-efficient solutions; and a working style and approach that is compatible with the PARTNERSHIP’s need for a long-term partner.

2. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open competitive process. While not a requirement for this RFP, the PARTNERSHIP will look favorably on candidates who currently are, or plan to become, a member of the PARTNERSHIP. Downtown, civic and/or nonprofit related experience and projects are also considered a plus.

In the interest of the environment, the PARTNERSHIP will only accept electronic submissions. An acceptable electronic submission will consist of one PDF of the proposal which can be created in whatever authoring program desired (MS Word, PowerPoint, etc.). Within that PDF, we expect you to have relevant samples of your work and other references as needed.

A required format and outline for your proposal is included in Section 8 of this RFP.

Your PDF proposal must be delivered electronically to the PARTNERSHIP office by 5:00 pm, Monday, August 26, 2013. Proposals received after that time will not be considered. The PDF may be delivered the following ways:

- If 5 MB or under, as an email attachment to bwarren@downtowndenver.com
- If larger than 5 MB, as an FTP link within an email, or on one USB flash drive or CD. Flash drives and CDs will not be returned.
We will accept other electronic forms of submission provided they are easily opened, accessed and shared, and provided that you get prior approval for this format from Beth Warren at the PARTNERSHIP.

The PARTNERSHIP will send candidates an email confirming timely receipt of your proposal.

The pricing in your response must be inclusive. If your price excludes certain fees or charges – such as third-party licensing fees for software -- you must provide a detailed list of fees with a complete explanation of those fees.

If the execution of work to be performed requires the hiring of sub-contractors, you must clearly state this in your proposal. Sub-contractors must be identified and the work they perform must be defined. However, you do not need to tell us how much you will be paying these sub-contractors. Please include the name, address, EIN and contact person of the sub-contractor. The PARTNERSHIP will not refuse a proposal based on the use of sub-contractors; however we retain the right to accept a proposal while refusing specific sub-contractors you have selected.

The contents of your response and the provisions of this RFP will be available for inclusion in final contractual obligations. Consequently, your proposal must be signed by a duly authorized owner, officer or agent of the company submitting the proposal.

### 3. CONTRACT TERMS

The PARTNERSHIP will negotiate contract terms and final pricing upon selection. All contracts are subject to review by the PARTNERSHIP’s legal counsel. A project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget, deliverables, timeline and other necessary items.

### 4. TIMELINE

- This RFP is dated **August 1, 2013**, and distribution will begin shortly thereafter.
• Please submit an email stating your Intention to Respond to the RFP to Beth Warren no later than 12:00 pm August 16, 2013. Failure to submit an Intention to Respond will not eliminate a candidate from submitting a proposal; it may, however, preclude you from receiving email updates, clarifications and answers to questions.

• Other Questions concerning this proposal must be submitted in writing to Beth Warren by email no later than 5:00 pm on August 19, 2013. Answers to questions and clarifications will be shared with all candidates who have submitted an Intention to Respond.

• Proposals are due no later than 5:00 pm on August 26, 2013.

• Proposals will be evaluated by PARTNERSHIP staff and consultants starting August 27, 2013. We may require interviews with candidates, site visits or clarifications on or about the week of September 9, 2013. You will be notified if an interview, site visit or clarifications are requested.

• The successful candidate will be selected and notified on September 16, 2013. Contract negotiations with the successful candidate will begin immediately upon notification. All other candidates will be notified shortly thereafter. Work will begin immediately upon contract signing.

• The project must be completed by November 11, 2013. Please leave room in your proposal timeline for testing of the CRM before the go-live date.

• The PARTNERSHIP reserves the right to modify the terms, timeline and deliverables of this RFP and the work it prescribes at any time.

5. BACKGROUND & ANALYSIS

Background

The PARTNERSHIP currently uses multiple systems to track membership, including:

1. iMIS database (CRM, financial management, reporting, activity tracking)
2. Salesforce (member prospect management, sales tracking, reporting)
3. eTouches (event management)
4. Emma (email communications)
5. SurveyMonkey (research and surveys)
6. PARTNERSHIP website (member directory and calendar of events)

The challenge the PARTNERSHIP faces is multi-faceted: we routinely double and triple enter critical member information in multiple areas; our tracking and reporting are challenging; the maintenance and support agreements with multiple systems do not align; staff users do not have a solid understanding of all systems and therefore, pick and choose which ones they use, meaning large amounts of information are missing.

In the past, as new needs evolved, the PARTNERSHIP simply added new systems, rather than adding features to the existing system (iMIS). Many of the current tools do not communicate with one another, which has caused a massive problem in collecting and reporting comprehensive member information. Since the PARTNERSHIP does not have internal IT capabilities, the PARTNERSHIP’s CRM and other tools have been maintained by several staff members, each with their own style and language.

The PARTNERSHIP would like to manage its CRM through one department (Membership) with one point of contact. Other departments within the PARTNERSHIP will still manage their member-related content – but not administration. The PARTNERSHIP does not intend to bring any major IT activities in-house.

**Analysis of Current CRM**

The PARTNERSHIP has used iMIS as its CRM since 2007 and the five-year maintenance contract has expired. iMIS has limited functionality for tracking across departments within the PARTNERSHIP, such as event management, sales prospecing, and communications. The PARTNERSHIP would like to update its CRM to include multiple tools for tracking Member activity.

**Goals**

The PARTNERSHIP would like for the CRM to be mobile, cloud-based, and user-friendly so all staff will utilize it daily. We would like to combine tools into one comprehensive
CRM and enhance CRM functionality by adding forms, surveys, and data reporting currently unavailable via iMIS.

Challenges

- iMIS is difficult to use, and therefore, staff do not routinely use it to input or export information.
- Outdated data and/or incomplete data in iMIS.
- Multiple tools with different login information, uses, and compatibility with other tools.
- Inadequate tracking, reporting, and analytics.
- Missed opportunities for sales.
- Inadequate compatibility with new PARTNERSHIP website.

6. Approach, Vision & Strategies

Approach

Rather than upgrading multiple systems and continuing to run them parallel to one another, the PARTNERSHIP looks to implement a comprehensive CRM. This allows all staff to log in to one CRM but have access to tools they have used previously to track their own membership-related information.

Our development partner will be responsible for determining the best CRM to implement to achieve the PARTNERSHIP’s goals of having a single system with multiple features. The development partner will additionally propose a CRM that meets and/or exceeds the current needs of the PARTNERSHIP, while providing for future growth in tracking, reporting, sales, communication, and event management.

Upon completion, the development partner will continue in a role providing technical support, maintenance, backup, security checks, and general oversight.
All data imported from the current system into the new CRM will be the sole property of the PARTNERSHIP.

**Vision**

The new CRM will be a valuable asset to the staff, as well as a benefit to PARTNERSHIP members. The comprehensive CRM will make the PARTNERSHIP more efficient in tracking and reporting member activities, sending communications, and providing member benefits from one location.

**Strategies**

- Build a system that is user-friendly.
- Adapt current tools to be used within a more robust CRM.
- Create a custom reporting system that is easy to use.
- Build in features that cut down on staff time, such as membership renewal reminders and event confirmations.
- Customize the CRM to manage information coming from the PARTNERSHIP website, such as membership applications and inquiry forms.
- Use existing software and technologies that are industry “standards”.

**Functionality Wish List**

- Navigation: Simple navigation with usability in mind.
- Integration: Ability to integrate a mass email system into the site to allow for people to subscribe to various different publications and news updates.
- Integration: Compatible with financial/accounting software (Sage).
- Integration: Event management and survey tools.
- Customization: Create web forms that allow for visitors to submit information for membership account updates, interest in information about opportunities for
bringing business to Downtown Denver or apply to be a part of our Vendor program.

- Customization: Custom tracking reports and dashboards
- Website compatibility: integrating member directory and member events calendar

7. Budget & Scope

Your budget must encompass all design, production, programming, software licenses or acquisitions, sub-contractors and third-party or vendor fees for development and maintenance of the CRM for one year following completion of the project.

Please be specific and detailed in your budget proposal for the following scope of work:

Scope - Review and discover with the PARTNERSHIP staff the objectives, audiences, graphic look and feel, functions, user navigation and technology requirements of the new CRM. Design, program and develop a new CRM for the PARTNERSHIP that incorporates content and components of the existing CRM and other tools, while consolidating functions. Recommend and implement a selected list of enhancements. Recommend and implement a hosting solution. Test the CRM. Data-mapping. Manage the switch-over and implementation from the existing system and hosting environment to the new. Train key PARTNERSHIP personnel on content management and administration. Provide one year of routine technical and maintenance support as well as on-call for crisis or emergency assistance.

- Fees – For your development, design and programming of the new CRM.
- Expenses – Any subcontractors, licenses, software acquisition, vendors, or hosting costs. If these are recurring monthly or annual costs, please include the amount for one year.
- Software- Any expenses associated with purchase of software or additional modules to existing software.
• Maintenance & Support – Your estimated fees for one year of routine maintenance and technical support. How do you charge: Hourly? Flat fee? Retainer?

• Additional Work – How you charge for any additional work or consulting that may be required above and beyond this scope. Hourly? Flat fee? Retainer?

8. PROPOSAL FORMAT & OUTLINE

Format

You may use whatever authoring software you prefer for creating the proposal. However, the proposal must be delivered as a PDF. Please optimize the PDF so the file size is manageable. If the file is 5 MB or smaller, you may email it to Beth Warren at the PARTNERSHIP as your response. If larger than 5 MB you will need to deliver the PDF on a USB flash drive or CD. In addition, please follow the following format specifications:

• Page size: 8.5 x 11 inches (vertical or horizontal).
• Font size: no smaller than 10 points.
• Maximum proposal length: 15 pages (not including attachments).
• Graphics: optimized for quick page loading on the PDF.
• URLs: active links within the PDF.

Outline

Your proposal MUST follow the outline described below:

I) Title Page/Cover Letter - Include your company name, address, web site, telephone number, and primary contact person with e-mail, direct line and mobile phone numbers. The title page will be considered a cover letter, and should be signed by an agent, owner or authorized officer of your company.

II) Qualifications – Provide a complete description of your company’s structure, expertise and experience in CRM design, development and management. Your qualifications should at least include:
• Company profile – Length of time in business, founders/owners, number of full-time employees, organizational capacity, technology, hosting and/or server capacity, equipment, Partnerships, vendor or licensed arrangements, and other unique attributes.

• Statement of Experience & Approach - A brief description of your experience and approach to implementing CRMs for clients. What makes you different or better than the rest? Relevant Work – a selection of up to five best CRM implementations that you have completed that are comparable or relevant to the work in this RFP. Briefly describe for each your role, budget, and time-frame for completion.

• Project Management – Submit how you propose managing this project, i.e., who will be your main point of contact, who will be assigned from your team, in what roles and with percentage of time involved. Provide a flow chart that shows this project management, as well as the names and bios of those working on this project.

• Client List – Comprehensive list of current and past clients.

• References – The names and contact information for three former or current clients.

• Terms & Conditions – Describe the way you invoice your clients; include a sample invoice if appropriate. Describe any other terms or conditions of your proposed relationship.

III) Discovery – Describe your process for working with the PARTNERSHIP team as well as other staff involved to review and confirm strategy and objectives; design look and feel; user navigation; assessing functions and capabilities; technology; hosting; administration; tracking; timeline for deliverables; and other issues discussed or touched upon in this RFP.

The PARTNERSHIP understands that during this Discovery part of the project, the selected candidate’s scope of work may change. Any changes to your proposal that occur from this Discovery will be by mutual agreement of the PARTNERSHIP and the selected candidate.

IV) Development – Describe your process and standards for developing a new CRM system for the PARTNERSHIP.
V) Technology – Describe the technology specifications you will recommend and guarantee for the new CRM system. Your technology discussion should include:

- Hosting – Where and how do you recommend hosting for the new CRM? Describe datacenter location, Internet connection, server capacity and disk space, climate/humidity/fire controls, power backup, daily database backup, technical support, uptime guarantee, disaster recovery and other relevant specs.
- Security – Describe how you will develop the CRM to prevent against security breaches.

VI) Testing – Describe your process and criteria for testing the new CRM.

VII) Training - Describe your process for training PARTNERSHIP staff on content management and site administration.

VIII) Technical Support and Maintenance – Describe how you will provide ongoing technical support and maintenance. What is your response time to routine questions and requests? What is your after-hours policy? What is your disaster-recovery approach?

IX) Budget and Fees – Provide a detailed budget for this project, as described in Section 7 of this RFP, to include:

- Fees – For your development, design and programming for the new CRM.
- Expenses – Any subcontractors, licenses, software acquisition, vendors, or hosting costs.
- Maintenance & Support – Your estimated fees for one year of routine maintenance and technical support. Is this a flat monthly fee? Hourly, and if so what are the rates? After-hours support? Do you have packages? What is included?
- Additional Work – Your fees or hourly rate for any additional work or consulting that may be required above and beyond this scope.

X) Timeline – Provide a detailed timeline for the stages and deliverables of the project. Make sure that you give a date by which you believe the new CRM will go-live
and the old system transferred over. We are looking for a reasonable go-live date with adequate time for discovery, design review, development, testing and training.

XI) **Warranty** – Describe the warranty you provide.

XII) **Attachments** – Include any relevant attachments such as sub-contractor information, vendor information, software descriptions and hosting environments.

### 9. Existing Technologies & Software

The new PARTNERSHIP CRM may have to integrate with the following technologies and software. Candidates should be prepared to recommend integration solutions, or new solutions if appropriate. Except for the PARTNERSHIP website, we are not necessarily wedded to the technologies below.

- Emma
- Survey Monkey
- Salesforce
- eTouches
- PARTNERSHIP website

### 10. Evaluation Criteria

The following criteria will form the basis upon which the PARTNERSHIP will review and evaluate proposals.

- Experience and Expertise – Candidate has successfully completed similar projects and has the qualifications, personnel and availability to complete this project. We will evaluate the depth and breadth of staff and subcontractors.
• Technology, Programming and Development Skills – Candidate has the in-house skill set and knowledge base for all aspects of the project. Candidate is confident enough to warrant their deliverables for a certain period of time.

• Proposal Recommendations – Candidate has thoughtfully described the process for development and switching over to the new CRM; the recommendations for enhancements; hosting and ongoing IT recommendations; and the ease of the PARTNERSHIP’s management and administration of the system after it is delivered.

• Budget – The candidate has proposed a realistic budget for design and development, expenses and monthly technical support and maintenance.

• Timeline – The candidate has proposed a reasonable timeline, including stages for discovery, development and testing.

• Service, Passion, Enthusiasm and Chemistry – Based on the proposal, interviews and/or site visits, the candidate will demonstrate a high level of personal service, passion and enthusiasm for the project. There also should be a good “chemistry” between the candidate and the PARTNERSHIP.

11. ABOUT THE DOWNTOWN DENVER PARTNERSHIP (PARTNERSHIP)

The PARTNERSHIP

The Downtown Denver Partnership is a non-profit business organization that creatively plans, manages and develops Downtown Denver as the unique, diverse, vibrant and economically healthy urban core of the Rocky Mountain region. With a reputation for nearly 60 years of excellence, the Partnership plays many diverse roles to enhance Downtown Denver. The Partnership represents 700 member businesses in the area and serves as a leader, place-maker, convener, idea generator, facilitator, recruiter, team-builder and policy advocate.

The PARTNERSHIP has 31 staff members, numerous temporary employees, approximately two interns per season, as well as four boards of directors, and multiple committees. Our location is in Denver, CO on the 16th Street Mall.

The PARTNERSHIP has six departments including:
• Marketing, Communications and Public Affairs
• Downtown Environment
• Events
• Membership
• Economic Development
• HR, Finance and Administration

Projects and initiatives that these departments work on include:
• Reports (5-6 per year)
• Events
  o A Taste Of Colorado (Labor Day weekend)
  o Skyline Park Events (skating rink, basketball court, movies, concerts)
  o Make Music Denver (June 21)
  o Parade of Lights (Dec)
  o New Year’s Eve Fireworks (Dec 31)
  o Rocky Mountain West Urban Leadership Symposium (Feb)
  o Annual Awards Ceremony (May)
  o Annual Meeting (July)
• Membership
• Retail retention and recruitment
• 16th Street Mall revitalization efforts
• Residential Marketing
• Leadership Programs
• Corporate recruitment
• Real Estate Developer Engagement

The PARTNERSHIP generates income through the following methods:
• Membership program
• Events and ticket sales
• Sponsorship of programs and events
• Grants
• Contracts
• Publication advertisements