Education Scheduling Software Replacement Project

Request for Proposal

RFP Date: January 17th, 2020

Due Date and Time:
March 6, 2020 by 4:00pm EST
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1 Introduction

The Chesapeake Bay Foundation (CBF) is requesting Offers from qualified firms and/or individuals for the Education Software Replacement Project, an enterprise software selection and implementation initiative to modernize business systems in order to facilitate the mission of the organization, achieve operational efficiencies, and allow CBF to build a sustainable business model.

The intent of this Request for Proposal (RFP) is to select software solutions and related implementation services that address all the needs described within this RFP. In general, the Education software selection's scope includes Constituent Relationship Management (CRM), program scheduling management, event management, and online registration capabilities. CBF is open to using either a native integration or best of breed approach depending on the ability of the proposed solution(s) to meet their needs.

The successful Offeror(s) will be expected to work closely with CBF’s designated Project Management Team to administer an effective and efficient program to successfully implement a complete solution.

1.1 Intent to Bid

Please provide an email response of your intent to bid on this RFP. Providing this information to CBF will allow you to be copied on all updates to the RFP process including vendor submitted questions, and CBF responses.

Within your email, please provide the following information

To: ndunn@cbf.org
Email Subject Line: Intent to Bid
Body of email
Company Name
Contact Name
Email
Phone

1.2 RFP Due Date

Offers shall be received via electronic email delivery on March 6, 2020 by 4:00 PM ET at the email address below:
ndunn@cbf.org
Nicole Dunn
Chesapeake Bay Foundation
6 Herndon Avenue
Annapolis, MD 21403
Please compress (via “Zip”) your proposal(s) to limit email size constraints.
No public disclosure shall be made until after award of the Contract resulting from this Request for Proposal (RFP).

1.3 Response to Questions

Please submit questions in an email to Nicole Dunn (ndunn@CBF.org). Any and all questions regarding this RFP shall be directed to Ms. Dunn and to no other office or individual at CBF. CBF may answer informal questions orally. CBF makes no warranty of any kind as to the correctness of any oral answers and uses this process solely to quickly provide minor clarifications. Oral statements or instructions shall not constitute an addendum to this RFP. Offeror shall not be entitled to rely on any verbal response from CBF. Formal questions regarding any part of this RFP that may result in material changes will result in a formal addendum to the RFP.

1.4 Selected Vendor Presentations
CBF may request a presentation, demonstration or samples to be given to a selection committee in the event the Offer is deemed to be among the most advantageous to CBF. CBF will schedule all presentations and in the event a presentation is scheduled, demonstration scripts and topics will be included in the invitation. Every attempt will be made to limit the demonstrations/presentations to no more than one business day.

It will be the responsibility of the prime bidding contractor to organize and/or prepare for the required demonstrations, including the coordination with other 3rd party organizations that have been proposed within your proposal.

1.5 Final Contract Negotiations and Notification of Award
This RFP is part of a competitive negotiation process intended to allow CBF to obtain goods and services as outlined herein in a manner that is most advantageous to CBF. This RFP provides CBF the flexibility to negotiate with offerors, if desired, to arrive at a mutually agreeable relationship. Price may weigh heavily in the evaluation process but will not be the only factor under consideration and may not be the determining factor.

1.6 Intent
It is CBF's intent to select a single offer, which are most favorable in all respects, including scope, availability of services, quality of services, reputation and price. If not otherwise stated herein, multiple awards may be made or an award(s) may be made partial, by part, by line item, or by any combination of parts if identified as being in the best interest of CBF.

1.7 Authority
This document has been prepared for use by internal organization audiences as well as industry suppliers. It should not be provided to external bodies without the express written or verbal consent of the Vice President for Administration. CBF will not reimburse any information or administrative costs incurred as a result of participation in response to the RFP. All costs associated with response will solely reside at the responding party's expense.

1.8 Confidentiality
All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to CBF’s enterprise software effort, may be disclosed to another party or used for any other purpose without the express written or verbal consent of CBF.

1.9 Audience
The intended audience for this document includes industry suppliers with expertise in delivering an integrated solution with the following major components:

- Comprehensive and integrated CRM solutions
- Comprehensive and integrated program scheduling management
- Comprehensive and integrated program event management and online registration
- Industry partners to any of the before mentioned parties who may provide value added solutions or services to systems within the scope of enterprise software selection.

2 CBF Organizational
2.1 About CBF
Established in 1967, the Chesapeake Bay Foundation (CBF) is the largest regional nonprofit conservation organization dedicated to saving the Chesapeake Bay, its rivers and streams, and the wildlife that call it home through education, advocacy, litigation, and restoration. Since 2010, CBF has engaged in a focused effort to
defend and implement the Chesapeake Clean Water Blueprint, a binding federal and state collaborative agreement aimed at reducing pollution to the science-based, legally-affirmed levels established by the U.S. Environmental Protection Agency (EPA). The Blueprint is expected to be fully implemented by 2025. If the states and the federal government achieve Blueprint goals, the Bay will finally—after decades of failed efforts—be removed from the Clean Water Act’s impaired waters list. Successfully implementing the Blueprint depends on a well-informed, engaged, active, and diverse constituency of members, advocates, and volunteers who speak up and take action to save the Bay.

CBF has a staff of approximately 190 employees working in offices in Annapolis, Maryland; Richmond and Virginia Beach, Virginia; Harrisburg, Pennsylvania; and Washington, D.C. as well as 15 field education program locations. Our staff and volunteer corps work throughout the region educating students and adults, advocating for clean water policies, restoring waterways, and litigating when necessary.

CBF’s headquarters office in Annapolis, Maryland is the Philip Merrill Environmental Center, the world’s first U.S. Green Build Council’s LEED platinum building. In 2014, CBF opened the Brock Environmental Center—one of the world’s most energy efficient, environmentally smart buildings—in Virginia Beach, Virginia. CBF has an annual budget of approximately $26 million and is supported by 300,000 members and e-subscribers. For more information on CBF, please visit cbf.org.

2.2 Project Background and Current Environment

CBF is consistently recognized as a premier organization dedicated to saving the Chesapeake Bay, a National Treasure. In order to continue to Save the Bay, CBF has embarked on a strategic planning process. That process has highlighted the need for an updated, more sophisticated and integrated education scheduling enterprise software solution.

Today’s CBF’s Education department’s software does not adequately support the department’s mission, business processes or the many needs and wants of the various constituencies, both internal and external.

To address these current shortcomings, The Chesapeake Bay Foundation (CBF) is requesting Offers from qualified firms and/or individuals for the **Education Scheduling Software Replacement**, an enterprise software selection and implementation initiative to modernize business systems in order to facilitate the mission of the organization, achieve operational efficiencies, and allow CBF to build a sustainable business model.

The following table lists the core or key applications that are currently being used by the Education Department. Other tools are being utilized with CBF and will be provided as needed.

<table>
<thead>
<tr>
<th>Application</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>EventPro</td>
<td>Profit Systems, Inc.</td>
</tr>
<tr>
<td>Luminate Online</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Luminate CRM</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Intacct</td>
<td>Sage</td>
</tr>
</tbody>
</table>

3 Statement of Need

3.1 Statement of Need

In general, the fundamental goal of the Education enterprise software selection initiative is to develop a comprehensive information and business system that assists the department in all operational areas related to scheduling schools, teacher, and students for Education programs and communicating with teachers, students, and internal staff as needed.

3.2 Scope of Work

CBF envisions replacing all the functionality outlined in this RFP in one project but the roll out of core areas of functionality may be staggered to better align with the Education department’s business cycles.
3.2.1 Functional Scope
- Education Scheduling
- Individual Event Registration (online and offline)
- Group Application and Event Scheduling (online and offline)
- Constituent Management
- Event Communications
- Financial Management

3.2.2 Life Cycle Implementation Professional Services
Services would include:
- Configuration/Development – including all required interfaces to 3rd party solutions and/or data sources (budget estimate)
- Data Conversion Phase (Budget estimate)
- System testing/Acceptance Testing Phase (Budget Estimate)
- Training -- Technical and End User (budget estimate)
- Post Go Live/Shake Out support (Budget Estimate)

4 RFP Response
Offer shall be submitted in the format requested in “RFP Response Format” section. Offers in any other format may be rejected. Conditional Offers shall not be considered. Cover Letter to be signed by an authorized individual. Offer that is not signed may be rejected. Offers to be submitted via E--Mail to the following address. A confirmation Email will be provided.
Contact Email: ndunn@cbf.org
Contact Name: Nicole Dunn
The following structure should be used in the offeror’s response to this RFP.

4.1 CBF Evaluation Criteria
It is CBF's intent to make an award to Offeror that, in the opinion of CBF, presents an offer that appears to be favorable to CBF, based upon the scope, availability of services, quality of services, reputation, and price offered. The criteria for evaluation of responses will be based on the following point structure:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offeror’s Qualifications, Project Resources, Client References</td>
<td>10 Points</td>
</tr>
<tr>
<td>A detailed technical Offer including, but not limited to the following:</td>
<td></td>
</tr>
<tr>
<td>- Clarity and reasonableness of proposed approach, method, accountability of implementing the solutions specified</td>
<td>20 Points</td>
</tr>
<tr>
<td>- Functional Requirements</td>
<td>30 Points</td>
</tr>
<tr>
<td>- Solution Architecture</td>
<td>10 Points</td>
</tr>
<tr>
<td>Price Proposal</td>
<td>20 Points</td>
</tr>
<tr>
<td>Overall responsiveness to RFP</td>
<td>10 Points</td>
</tr>
</tbody>
</table>

4.2 Technical Proposal – Required Response Format

4.2.1 Cover Letter and Executive Summary
Signed by authorized individual, scanned and inserted into the proposal.
### 4.2.2 Proposed Solution Overview

Please provide a general Solution Overview

### 4.2.3 Company, References and Team Resources

<table>
<thead>
<tr>
<th>Company Name</th>
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<tbody>
<tr>
<td>Company Address</td>
<td></td>
</tr>
<tr>
<td><strong>Contact Information</strong> (Party Responsible for responding to RFI)</td>
<td>Name:</td>
</tr>
<tr>
<td></td>
<td>Address:</td>
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<td>Phone:</td>
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<td></td>
<td>Fax:</td>
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<td></td>
<td>E-mail:</td>
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<tr>
<td>Company Webpage</td>
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<tr>
<td>Main Products / Services</td>
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<tr>
<td>Main Market / Customers</td>
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<tr>
<td>Number of years in the Market</td>
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<tr>
<td>Company location(s) that will serve CBF and this project</td>
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<tr>
<td>Number of Employees</td>
<td></td>
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<tr>
<td>Product Development</td>
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<td>Professional Services</td>
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<td>Marketing &amp; Sales</td>
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<td>Quality Assurance</td>
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#### 4.2.3.1 Company Overview

Please provide the following information on your organization

#### Financial Information

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<table>
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<tbody>
<tr>
<td>Previous year gross revenue</td>
<td></td>
</tr>
<tr>
<td>Previous year net income</td>
<td></td>
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<tr>
<td>Stock markets listed (if applicable)</td>
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</tbody>
</table>

Use the following section to include any additional financial information you feel would be helpful in demonstrating the financial stability of your organization. If selected for negotiations, Offeror may be required to provide the last two (2) years of audited financial statements. 
4.2.3.2 References
Provide, at minimum, three (3) references, not including The Chesapeake Bay Foundation, identifying firms with requirements similar to those of CBF. Provide the name of the firm, contact person, email and the telephone number. CBF reserves the right to contact additional references not provided by Offeror. Preference may be given for those references, which are most similar to CBF including experience with integrating Offeror's solution or product with other systems for:

Please provide three references

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Contact</th>
<th>Phone Number</th>
<th>Email</th>
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Project Description:

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<th>Client Name</th>
<th>Contact</th>
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4.2.3.3 Team Resources
Provide a list of proposed personnel and/or functional job titles. Describe the specific assignment each person/resource will have on CBF project.

Should Offeror subcontract any part of the stated scope of work, please list and describe any subcontractor's qualifications and relevant experience. Describe how Offeror guarantees subcontractor performance. Offeror shall remain solely responsible for the performance of a resulting Contract from this RFP. All CBF payments for goods and/or services shall be made directly to the Offeror.

Please provide a suggested Organization Chart and please provide a project staffing model similar to the tables below.
4.2.3.4 Vendor Proposed Staff

<table>
<thead>
<tr>
<th>Resource Title</th>
<th>Role</th>
<th>Duration</th>
<th>Est. FTE % on Project</th>
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4.2.3.5 Recommended CBF Staff

Please describe CBF resources necessary to ensure a successful implementation. Based on best practices and your firm’s experience with similar projects, please estimate the time each role would be required for the project.

<table>
<thead>
<tr>
<th>Resource Title</th>
<th>Role</th>
<th>Duration</th>
<th>Est. FTE % on Project</th>
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4.2.4 Functional Requirements

Please complete the Excel worksheet of functional requirements included in electronic format as part of your RFP response. Instructions for completing the requirements matrix are contained in the worksheet. In addition, a Word version of the information in the Excel document is included in Appendix A.

4.2.5 Proposed Architecture

4.2.5.1 Technical Architecture Overview

Please provide a technical narrative of the proposed solution including any graphical representation of each solution component and the overall solution architecture – including all 3rd party solutions not part of the Offeror’s core solution. Additionally, describe the technical solution components including what is shared in a multi-tenant environment, approach used to manage multi-tenant and what components are unique to CBF. Include a discussion of options available and the features/benefits/drawbacks of each approach. Please list the database platform (option) used within the core solution as well as additional databases required to operate 3rd party solutions.
4.2.5.2 Development Tool Suite
Please describe the Development Tool Suite that will allow CBF to build custom reports, add views/screens and fields, change field names, hide fields/screens and build other more complex application extensions, including Mobile Applications.

4.2.5.3 Cloud/Hosted/SaaS Narrative
CBF’s prefers a SaaS/Cloud/Hosted based solution. However, we will consider an on-premise solution should the Offeror make that recommendation. Please fully describe these solution delivery options as relevant service level agreements and architectural options. Also describe the type and number of environments included within your core solution including a minimum of the following environments -- Development, Testing, Training, and Production.
Provide any other relevant information you deem necessary or that would differentiate your solution from competitors.

4.2.6 Proposed Implementation Approach
Please provide your suggestions/recommendations of a CBF rollout approach based on your understanding of CBF project. Include “best practices” recommendations addressing such topics as
- Shared roles and responsibilities during implementation.
- Knowledge Transfer Approaches including but not limited to End user and technical training
- Post Go Live Support during shake out period – options and methods

4.2.7 Proposed Implementation Services
This section identifies the Implementation Services desired by CBF. Please feel free to expand and/or modify this list based on your firm’s proposed approach.

4.2.8 Proposed Project Schedule
- Configuration/Development – including all required interfaces to 3rd party solutions and/or data sources (budget estimate)
- Data Conversion Phase (Budget estimate)
- System testing/Acceptance Testing Phase (Budget Estimate)
- Training -- Technical and End User (Budget estimate)
- Post Go Live/Shake Out support (Budget Estimate)
Please describe the approach and methods used for each of the above life cycle steps. Please include all proposed deliverables for each life cycle activity mentioned above.
Please include a Project Schedule representative of your understanding of CBF project with all proposed life cycle phases, tasks and key milestones. Please provide in electronic format as well as a summary printed version.

4.3 Cost Proposal – Required Response Format
CBF recognizes the inherent flexibility and optional approaches within any proposed solution. We also recognize that scope definitions may change or be altered based on new information, requirements, policy changes, timeline changes and other factors during the implementation life cycle. CBF is seeking a true partnership that shares both the risks and accountability for project success.

To that end, the cost proposal will consist of both firm fixed cost components as well as initial budgetary estimates. CBF will evaluate each vendor’s proposal on overall implementation costs, a 3-year total cost of ownership model, cost assumptions, and cost reasonableness with respect to proposal pricing lower than expected industry standard practices. CBF reserves the right to move to a firm fixed cost contract after the Offeror has conducted its Discovery/Requirements Phase, thereby assuming the all requirements are understood, documented and approved by CBF.
Cost shall be provided for the following:

- Software Components including all proposed 3rd party solutions (firm fixed cost)
- Configuration/Development – including all required interfaces to 3rd party solutions and/or data sources (budget estimate)
- Data Conversion Phase (Budget estimate)
- System testing/Acceptance Testing Phase (Budget Estimate)
- Training -- Technical and End User (Budget estimate)
- Post Go Live/Shake Out support (Budget Estimate)

**4.3.1 Vendor Proposed Software**

Please describe all proposed/recommended/optional software components including 3rd party solutions that comprise your overall solution architecture for Phase I requirements. It is the responsibility of the offer to negotiate and include all 3rd party solutions and services required to meeting Phase I requirements. Where options exist for 3rd party solutions, please provide initial year implementation costs as well as ongoing life cycle costs (yearly) and any optional per unit pricing as needed.

Please assume the following user base assumptions for pricing:

- Active Users-15
- Inactive/Occasional Users – 40 (primarily via mobile application-see Appendix B)

Please provide the Cost Proposal in a separate document/separate file for evaluation using the table below.

<table>
<thead>
<tr>
<th>Description (Itemize as Required)</th>
<th>Implementation Year</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Software Costs</td>
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<td></td>
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<tr>
<td>B. Services</td>
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<td></td>
<td></td>
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<tr>
<td>Program Mgmt</td>
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<td></td>
<td></td>
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<tr>
<td>Discovery/Requirements Implementation, etc.</td>
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<td></td>
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<tr>
<td>C. Customizations</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>D. Hosting/Other Costs</td>
<td></td>
<td></td>
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<tr>
<td><strong>Total:</strong></td>
<td></td>
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</tbody>
</table>

**4.3.2 Payment Schedule**

Please provide a proposed payment scheduled based upon deliverables and/or key milestones throughout the implementation life cycle.

**4.3.3 Labor Rate Card**

Please list the hourly/daily rates for staff you would include in this project in the table below. Please include any discounts that are available. Please estimate any on premise work needed (such as training). Please include an estimate of travel costs.

Please use the table below as a guide for your response.

<table>
<thead>
<tr>
<th>Role</th>
<th>Standard Rate</th>
<th>Discounted Rate</th>
<th>Travel Costs</th>
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<tbody>
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</table>
4.4 Proposed Agreements – Required Contract Documents
Please include the following documents described as part of your proposal. CBF anticipates reviewing all terms and conditions and will provide feedback and/or comments prior to contract award.

- Professional Services Statement of Work (SOW)
- Hosted Storage / Environments Service Level Agreement
- Software License Agreement including Escrow, Warranty
- Customization Warranty Agreement
- Software Support/Service Level Agreement(s) (SLA)
- Other Third-Party Agreement(s)

If Offeror is providing additional software components under this agreement, please include those 3rd party software, support, warranty, SLA agreements in this section.

5 Appendix A. Listing of Functional Requirements
The following list is included in the supplemental Excel File.
Please provide the electronic version of this file as part of your response. This information below is included in addition to the electronic file submitted with this RFP.

5.1 Functional Requirements Checklist

5.2 Introduction
The following is a list of functional requirements for the new Education solution. If there are multiple options to address the requirement (e.g. multiple reporting tools embedded within the solution), please describe the most appropriate tool/module/method to meet that requirement.

5.3 Instructions:
Please use the accompanying Excel requirement matrix to respond. Within each requirement, please name and provide descriptions of the proposed solution or approach addressing the solution. Please respond as follows for each requirement.
1. Yes/No – Requirement met within core vendor solution with little or no configuration (<5 hours) – if no
2. Yes/No – Requirement met within proposed vendor owned secondary solution with little or no configuration (< 5 hours) – if no
3. Yes/No – Requirement met within proposed 3rd party vendor solution. If Yes, please provides details of the proposed 3rd party solution (including level of native integration out of the box and/or required integration). If necessary, provide additional detail as it pertains to the 3rd party solution in an appendix, fully describing the proposed solution and vendor. If No,
4. Yes/No - Requirement to be met with material configurations and/or “custom” development effort (with core, secondary or 3rd party solutions - > 5 hours). For each of these requirements, please provide a budgetary estimate within the cost proposal. If No,
5. Cannot/Will not meet requirement

We also recognize that a requirement may be addressed using a combination of the above and/or utilizing a different approach then suggested within the requirement. If that is the case, simply respond “Yes” to the appropriate area(s) and provided an explanation within the requirement matrix including, as necessary, any qualification to your response related to what your proposed solution will or will not deliver.

5.4 Education Scheduling
5.4.1 Education runs two very different scheduling/registrations processes. For these requirements, they will be divided into two types. Individual Event Registration and Group Event Application and Scheduling.

5.4.2 Individual Event Registration – Ability to have online registration to register as individuals for a pre-set event.

5.4.3 Group Event Application and Scheduling – Ability to have an online application process for groups (schools, youth groups, etc.) where CBF staff can assign groups based on schedule availability to programs and staff (from a resource calendar).

5.5 Individual Event Registration

5.5.1 In general, the proposed solution should provide the ability to support event setup, online and offline registration, payment processing, CBF resources/staffing assignment.

5.5.2 Proposed solution provides the ability to centrally schedule events and event logistics via the application.

5.5.3 Proposed solution provides the ability to register individuals or groups for events both online via the web and offline via the application. Program participants are entered (new participants) or drawn from a centralized constituent database (see section 5.9 Constituent Management) before, during or after event (on line and off line) with customizable registration forms.

5.5.4 Proposed solution provides the ability to identify individuals present at an event via a mobile device and record their attendance.

5.5.5 Proposed solution provides the ability to add “user defined” fields to the on-line registration forms that is viewable/reportable via the event management application.

5.5.6 Solution provides an event wait listing option with the ability to automatically notify individuals on a waitlist if space opens-up for an event.

5.5.7 Proposed Event Management solution provides ability to enter specific discount codes or “coupon code” to decrease event cost

5.6 Group Application and Event Scheduling

5.6.1 Ability for group/individual to complete an on-line application for event/program where the data would flow into the system where the application could then be “assigned” to an open date for a program/resource.

5.6.2 Applicant tracking through phases of CBF defined steps – e.g. Application, acceptance, contract, confirmed/canceled, close out, etc.

5.6.3 Proposed solution provides the ability to register organizations (schools, classes, etc.) as well as individuals for an event.

5.6.4 Proposed solution provides the ability to enter/track/tie student and teacher contacts to a “customer” (school) account, and the student to parent account (if applicable).

5.6.5 Ability to create and manage user defined fields

5.6.6 Ability to view and manage all events through a graphical calendar where program/resources (including staff resources) can be listed along with dates (See Appendix B) and events can be added, edited, deleted etc. via the calendar.
5.6.7 Ability for the graphical calendar to have both internal and external versions with specific fields turned on/off depending if it is for internal or external viewing. Also allowing for internal controls to publish the calendar for external viewing or have it completely remain ‘off’/hidden.

5.7 Event Communications

5.7.1 Proposed Education Management solution provides the tools, methods, and techniques to communicate items related to the event including email and SMS.

5.7.2 Ability to create, send, attach, and record/track confirmation agreements, invoices, deposit amounts, information packets (attachments), survey’s etc. to registrants

5.7.3 Provide automatic email invites (via CRM segments) and RSVP reminder emails, provide automatic follow-up emails based on dates, registration status, etc.

5.7.4 Provide event confirmation email using mail merge with personalization and attachment capabilities (i.e. approx. 600-700 confirmation emails are sent out 2 times per year)

5.7.5 Communications to event/program (internal) staff via online and mobile calendar – specific events and all events including click through to logistic information, including events comprising multiple locations and multiple days – see Appendix B examples.
5.8 Financial Management

5.8.1 Proposed Event Management solution provides the ability process on line and off-line (invoice-based processing, tracking and management) payment processing including credit card payment for programs and events including payment via mobile platforms against a pre-selected payment processor (e.g. PayPal, Stripe, etc.). Please provide payment processor options.

5.8.2 Proposed Education Management solution supports ability to tie education event applications to funding, contract, and grant sources.

5.8.3 Ability to manage Sponsorship payment processing and allocation to events

5.8.4 Provides integration with Intacct financial system / journal entries

5.9 Constituent Management

5.9.1 Ability to have records and track information for both individuals and organizations (teachers and schools).

5.9.2 Proposed solution provides the ability to track the following forms of constituent data:

5.9.3 Biographical detail.

5.9.4 Event participation history

5.9.5 Constituent attributes, classifications, and other custom fields.

5.9.6 Notes/contact/phone calls/letters/emails – i.e. all historical communication and touch points from all sources/channels including date of contact – ability to archive all contact points/emails after a certain date.

5.9.7 Preferences – user defined set areas of interest/areas of conflict, solicitation preferences, communication, opt in/opt out, etc.

5.9.8 Audit capabilities of changes/additions to records – down to the field level.

5.9.9 Ability to track relationships between individuals and organizations.

5.9.10 Ability to collect constituent data (all of the above) via Mobile platforms (smart phones, tablets). Please differentiate between responsive design capabilities within the core product versus native smart phone/table applications (please list and describe).

5.9.11 Ability to develop business rules and associated workflows when adding a new record.

5.9.12 Proposed solution provides the ability to map both teachers and schools to legislative districts: local, state and federal.
5.10 De-Duplication
5.10.1 This requirement checks to minimize duplicate constituent records including tools, methods for real-time duplication checks and/or batch checks and disposition methods.

5.10.2 Ability to define duplication rules and methods against both online and batch-processing.

5.10.3 Solution should provide a tool to review, merge, delete (take action) against duplicate records.

5.11 End User Reporting
5.11.1 Reporting requirements includes end user query and custom reporting.

5.11.2 Proposed solution provides reporting tool(s) targeted for simple list reporting, and mid-level complex reports

5.11.3 Ability to create ad-hoc reports and queries in the system based on any data in the system.

5.11.4 Ability to save ad-hoc reports for re-use.

5.11.5 Ability to output reports in multiple off-line formats – please list specific formats (e.g. PDF, CSV, Excel, etc.)

5.11.6 Ability to grant/restrict access to reporting tools to various users / profiles

5.11.7 Proposed solution provides reporting tools targeted to end (non-IT staff) user base – please describe the end user-based reporting tool options versus more sophisticated tools targeted toward IT staff.

5.11.8 Ability to manage reporting against accounts/household versus individuals with the system able to consolidate and/or eliminate duplicate data (i.e. record found against an account and individual constituent)

5.11.9 Please provide a list in a separate appendix of all available reports available “out of the box”. Solution provides the tools and ability to modify these standard reports to suit end user needs.

5.11.10 Ability to schedule reports to be run and emailed out to end users on said schedule.

5.12 Information Technology
5.12.1 Application/Solution Architecture

5.12.1.1 Provide a narrative and graphical depiction of your solution architecture: On site, hosted, Software as a Service (SaaS), multi-tenant, etc.
5.12.1.2 Describe the locally hosted model if available

5.12.1.3 Okta integration for authentication through SAML or OpenID connect. Solution should allow for logins to only occur through Okta and not allow for local passwords within the application. If this has an associated increase in expense, please indicate.

5.12.1.4 No VPN tunnels shall be used in any portion of CBF implementation.

5.12.1.5 Documented REST based APIs exist (read & write) for all data elements within the system. Include a link to API documentation. If API throttling limits are in place, include a description of these limits. If this has an associated increase in expense, please indicate.

5.12.1.6 Solution must also be capable of being deemed PCI compliant.

5.12.1.7 All data shall be encrypted in transit.

5.12.1.8 All modules and functions within the system available without the use of remote desktop style technology (Microsoft RDS, Citrix, etc).

5.12.1.9 Should CBF choose to discontinue using the solution, describe the data offboarding process and typical costs to do so.

5.12.2 Application/Solution Architecture (Desired but not mandatory)

5.12.2.1 Capable of syncing profile data from Okta to application

5.12.2.2 SOC 2 Type II certification

5.12.2.3 Ideally, the software will be fully web based. Indicate if any locally installed components will be required, including browser plugins (Java, Flash, ActiveX, etc)

5.12.2.4 All data shall be encrypted at rest Are there tools/technologies available that will allow for more direct access of data within the ERP? (ODBC/SQL access, etc)

5.12.2.5 Does the system have the native ability to connect to PowerBI for additional dashboarding and analytics capabilities?

5.12.3 Mobile Support

5.12.3.1 Proposed mobile solution provides native support and/or rendering via various mobile platforms including smart phones and/or tablets

5.12.3.2 Proposed mobile solution provides mobile payments, online transactions (e.g. event registration, etc.)
5.12.3.3 Proposed mobile solution provides on-line and off-line (store/sync) database updates via mobile platforms

5.12.4 Configuration/Customization

5.12.4.1 Proposed solution provides the ability to modify existing forms

5.12.4.2 Proposed solution provides the ability to create new forms and attach to a specific function, module, workflow

5.12.4.3 Proposed solution provides the ability to add fields, change field names, add calculated field types to form

5.12.4.4 Proposed solution provides tools to create, modify workflows along with associated business rules

5.12.4.5 Proposed solution provides the ability to maintain the upgrade path/approach while segmenting local “customizations” for all the above modifications.

5.12.4.6 Proposed solution provides general user group security administration and role setup as well as the ability to customize specific user experiences per role/security profile (i.e. forms, landing pages, etc.)

5.12.4.7 Proposed solution provides tools to allow real time integration (via web services, API’s, etc.) with other 3rd party applications as identified in the table below.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
</table>
6 Appendix B -- Sample Views for Education Program Requirements

Booking calendar providing internal program staff to view program assignments, logistics and requirements. Each item is color coded depicting a variety of status (paid, unpaid invoicing, deposit status, etc.). Provides ability to view across dates of each month (or changing view to week, day, etc.) with "locations" (which can be programs or staff) as well as the ability to drill down into event details and schedule new events from the calendar.
Below are two images from a smart phone device that shows for the selected day, all programs and when the specific date is open for a particular program (e.g., Baltimore Harbor program. Integration with Outlook/Mobile provides the ability to show program scheduled, including dates, times, teacher contact information, and other pertinent event details.