



1501 John Tipton Blvd | Pennsauken, NJ 08110
Phone (856) 662-4884 | Fax: (856) 662-4489
www.foodbanksj.org

REQUEST FOR PROPOSALS

Salesforce Nonprofit Success Pack Assessment and Development Services

Timeline for Selection

- | | |
|-----------------------|---|
| • November 17, 2021 | Request for proposal distributed |
| • December 23, 2021 | Proposal due to Food Bank of South Jersey |
| • January 10-14, 2021 | Proposal presentations |
| • January 19, 2022 | Determination |
| • April 1, 2022 | Implementation completed |

Point of Contact

Proposal submission, questions regarding terms, conditions and technical specifications and all other inquiries about this RFP should be directed to Samantha Mitchell-Hope via email at smitchell-hope@foodbanksj.org. Proposals should be received no later than Thursday, December 23, 2021 by 4:30 p.m. EST.

Offerors are expected to present their proposals, virtually, the week of January 10, 2022. **Please provide Samantha Mitchell-Hope with your availability as soon as possible.** Note that all dates and information contained within this RFP are subject to change at the discretion of FBSJ, and notice of any changes will be provided to all offerors.

About the Food Bank of South Jersey

The Food Bank of South Jersey (FBSJ), a member of the Feeding America Network of Food Banks, is a non-partisan, not-for-profit organization that engages the community in its hunger-alleviation efforts. The Food Bank's mission is to provide an immediate solution to the urgent problem of hunger by providing food to people in need, teaching them to eat nutritiously, and helping them to find sustainable ways to improve their lives.

FBSJ works towards realizing its mission through localized campaign efforts; securing donations of food, funds and time from corporations, foundations, grocers, volunteers and other engaged stakeholders to support general operating, program and service expenses. In 2020, FBSJ distributed a record 22 million pounds of food through its direct service programs and through a network of over 200 nonprofit distribution partners – food pantries, shelters, senior and child feeding initiatives, soup kitchens etc. in Burlington, Camden, Gloucester and Salem counties, New Jersey.

Please submit proposals and questions to:
Samantha Mitchell-Hope, Sr. Manager of Mission Advancement
Food Bank of South Jersey
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Bid Overview

The Food Bank of South Jersey is requesting offers from qualified firms to optimize the organization's Salesforce Nonprofit Success Pack (NPSP) instance through technology strategy development, improved database configuration, feature enablement and end-user adoption training. Secondary goals are to simplify fundraising reporting through dashboards, achieve operational efficiencies of third-party integrations and maintain a sustainable business model that will support ongoing maintenance and flow of constituent record creation through third-party fundraising platforms, like Classy.

The intent of this request for proposal (RFP) is to select a Salesforce partner that addresses all of the needs described within this RFP. The scope of work will include tasks related to constituent relationship management, data hygiene, fundraising performance tracking and reporting, volunteer management, data security, user adoption and platform integration. The successful offeror will be expected to work closely with FBSJ's core Salesforce implementation team to administer an effective application.

Scope of Services

Services to be performed under the awarded contract pursuant to this request for proposal include, but are not limited to, a review of the current Salesforce Nonprofit Success Pack platform, database design, implementation/enablement, and routine in-person or virtual meetings with FBSJ staff, and report from the offeror that includes recommendation of the future state of the Salesforce production instance that meets current and forthcoming operational needs.

In addition to new implementations, there exists a need to provide ongoing technical support service toward issues, projects, user adoption and evolving data and integrations needs. This need will require direct support to complete or assist FBSJ in troubleshooting issues and concerns with the implementation.

Current areas of known support include, but are not limited to:

- Long term data strategy with a focus on technology adaptableness and data security
- Duplicate record management - Identify sources of duplicate data records and adjust matching and duplicate rules
- Enhancement of third-party software integrations; develop actionable next steps or integration to synthesize data from disparate sources to increase visibility of metrics. Essential integrations include, but are not limited to:
 - Classy
 - Celigo
 - Mail Chimp
 - Wealth Engine
 - Cloudingo

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- Formula
- NPSP components: Volunteers for Salesforce, Engagement Plans, Levels
- Automating processes through process builder, formula fields, API, etc.
- Configuration and user adoption training on:
 - Soft crediting
 - Pledged gifts
 - Matching gifts
 - Donation splitting
 - Donation restrictions or general accounting units
 - Gift Entry configurations that are dependent on the above and any new configurations developed as a result of the scope of work outlined in this RFP
- Audit and reconfiguration of fields on the household and organization objects; phasing out of redundant, outdated, non-NPSP related fields, as appropriate
- Review of fields used for donor and stakeholder segmentation; creating automations and processes as necessary to support donor stewardship activities
- Make recommendations for and prepare the organization for use of advanced marketing automation platform: i.e. Pardot or Marketing Cloud
- Audit and modifications to user permission sets and groups

Work Requirements

- Offeror must operate within a block of business hours in Eastern Standard Time (8:30am-4:30pmEST)
- Work should be completed in sandbox environment with opportunity for pre-launch testing of new ennoblements
- Weekly checklist report of tasks completed submitted via email
- Bi-weekly touch-base meetings with core FBSJ implementation staff members
- Comprehensive documentation of work to be performed and outcomes
- Dedicated user adoption support – the team needs to thoroughly understand how to use new features and process improvement considerations

Problem Statements

- We need reduced incidences of duplicate account and contact records created through integrations, specifically the online processing platform, Classy.

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- We need better reporting to provide insight on the performance and ROI of direct mail and digital response programs
- We need better insight on how our donors engage with our emails
- We need automation within Gift Entry fields to eliminate user entry errors
- We need better automation of task assignments to support donor moves management and donor journeys
- We need to increase visibility of communications sent from individual staff members, and solidify processes for maintaining communications across staff and next steps within Salesforce
- We need to decrease the number of fields that were migrated from old platform (Luminate, Salesforce Classic), but are no longer used or supported in the process builder
- We need better visibility of data processing requests and stages of project requests

Selection Criteria

The Salesforce partner selected must have a clear understanding of the FBSJ mission and its commitment to the community; strong proficiency in the Nonprofit Success Pack overlay, Classy online fundraising platform and duplicate record management. The vendor selected must act as a partner in solving hunger by minimizing expenses and maximizing revenue through effective feature enablement and user adoption support.

Upon notification of selection, the successful offeror is required to execute and deliver a contract within two weeks of notification. If the successful respondent is unwilling or unable to execute an agreement, FBSJ maintains the right to request another offeror to enter into a contract with FBSJ.

Selection criteria include:

- Cost
- Methodology: Please describe how your firm will approach the project with a detailed description, outline and anticipate date of completion of each deliverable
- Quality assurance: Define schedule for routine progress meetings, allocate a portion of project timeline to end-user testing and adoption, documentation of completed deliverables and knowledge base documentation for continued use of the organization and staff
- Experience with NPSP, Classy, nonprofit technology strategy development best practices
- Demonstration of positive results with current and previous clientele
- Experience level and competence of staff who will execute deliverables
- Strong understanding of current business processes, platforms and integrations used in the following processes: donation entry, campaign creation, report and dashboard KPI development,

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email communications, acknowledgement tracking, general accounting units, donor segment considerations, volunteer management, duplicate data management, marketing automations, journey builders, etc.

- Creativity and identification of additional strategic opportunities for growth and ease of completion for ongoing and repetitive tasks

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