Data Strategy Consultant
REQUEST FOR PROPOSAL

Friends Committee on National Legislation (FCNL) is seeking a consultant with considerable experience and knowledge of data strategy and technology platforms in the nonprofit sector to advise us on transitioning to a strategic, more optimized data system. FCNL invites qualified individuals, firms and organizations to submit a proposal for the requested services, as identified on the following pages.

TIMELINE OF PROPOSAL PROCESS
RFP released: February 20, 2018
Informational discussions available: March 5-9, 2018
Responses due: April 2, 2018
Selection phase: April/May 2018
Preferred start of project: May/June 2018

Please send proposals and questions to: Sara Robich, Database Manager, sara@fcnl.org

OVERVIEW

Background information
FCNL is seeking a data strategy consultant to guide us through a digital transformation project in order to develop a more strategic data structure, become more data-driven, and to be able to support the current and future data capacity, reporting, and analysis needs of our expanding programmatic and fundraising work. We want to maximize our ability to capture, visualize and utilize data, be more efficient, transition to cloud-based applications, and become more integrated across our databases and platforms.

FCNL is in the beginning stages of implementing an ambitious 5-year strategic plan. Part of that strategic plan is to strengthen and enhance our data and tech functions so that we can meet current needs and keep pace with future growth. Because of the quickly changing and interwoven aspects of technology and data systems, we are looking for an experienced consulting professional who is well-versed in current trends and technology geared toward nonprofits, and who is familiar with data issues common for nonprofits. This person will help us navigate this landscape and provide us with recommendations on
upgrading our systems, identify optimal configurations for our data platforms including data integration across platforms, help guide us through decision points and discussions, and other orchestrated assistance with this transformation project. Given the large scope and multiple layers of this project, we realize this might result in a multi-year consulting project. Ideally, the consultant will be local to the Washington, DC area.

About FCNL

FCNL is a non-partisan, multi-issue advocacy organization with a national focus, which connects Quaker testimonies on peace, equality, simplicity, and environmental stewardship with public policy. FCNL was founded in 1943 by members of the Religious Society of Friends (Quakers) and is a 501(c)4 nonprofit organization. Our sister organization, the FCNL Education Fund, was formed in 1982 and is a 501(c)3 nonprofit corporation.

Today, FCNL’s network of 60,000+ advocates and 13,000+ donors includes people from many different faiths and backgrounds. Located on Capitol Hill, FCNL is governed by a General Committee of 190 people from across the country and employs a staff of nearly 50. FCNL’s staff lobbies on the Hill, and we strategically call on our grassroots network to lobby in districts across the country. This grassroots network includes over 90 Advocacy Teams made up of approximately 1,400 individuals who are engaged in deep, relationship-based constituent advocacy in their congressional districts. FCNL’s loyal donor base includes a donor acquisition program, an established monthly donor program, a growing planned giving program, and a major gifts program that keeps our development officers busy with frequent travel.

Additionally, we have two major, multi-day events each year: Annual Meeting in the fall, and Spring Lobby Weekend in the spring. Each event typically draws approx. 400-500 attendees from around the country, and continues to grow each year. These events require the coordination of several hundred lobby visits, as well as planning various training sessions over multiple days.

Over the past 5 years, FCNL experienced rapid growth in several areas which includes adding several new staff positions, creating a new department (communications and marketing), constructing a physical Quaker Welcome Center building next door to our office, expanding and launching new programmatic work, and completing a successful capital campaign (a portion of which helped fund some of the expanded programmatic work). Through this growth, FCNL’s organizational capacity increased, but we don’t yet have the infrastructure to support current capacity demand, nor the expanding needs of the objectives within the strategic plan.

THE PROJECT

One of the priorities of the 5-year strategic plan is to foster organizational sustainability, and one of the key strategies to accomplish that priority is by strengthening our internal technology capacity. In order to attain that goal, we need to undergo a digital transformation of technology across the organization, and do so in a strategic, intentional way. To help us reach that nexus, we are seeking an experienced
consultant to guide us and help orchestrate our pathway forward to build an optimized, interconnected data system.

The pivotal changes that are stemming from our dynamic growth and 5-year strategic plan are leading to a different (and expanded) set of functionality and capacity needs in order to support fundraising and programmatic work, and the organization as a whole. We want to take advantage of these major shifts by taking the opportunity to intentionally and strategically approach our data setup for a resulting data system that is optimized to match FCNL’s complex needs and ensuing growth. We want to be proactive and intentional in our data set-up, and take into account the expected growth and direction of the organization. We want to be more data-driven and make better use of cloud-based technology and integration tools. We want to be able to see our constituent data in a more transparent, 360 degree view and perform robust data analysis to make better-informed decision.

In order for FCNL to proceed forward with our goals, we seek a data strategy consultant to identify an optimal configuration of our data systems, recommend software and database platforms, recommend best methods to integrate our different data platforms and tools, and help identify optimal use of staff resources for data work including whether or not to outsource certain tasks to specialized vendors.

We currently use a collection of different databases and data software tools, which have been adopted over time into FCNL’s toolbox, generally as a reaction to a need arising, and not necessarily as part of organization-wide deliberate strategy. We do not have an optimized data structure or data processes and there are multiple data siloes, all of which lead to several unwieldy aspects of our data set-up, including such things as redundancies and having an incomplete, partial view of our constituents and their involvement with us. Historically, FCNL has not typically reassessed technology after it has been adopted, which has resulted in retaining platforms and tools for far too long that are not suitable or optimal. As part of our strategic plan, we want to routinely review our technology and assess its suitability.

Current Resources: Main applications

**Raiser’s Edge 7** is our main constituent database, and in the near future, Blackbaud will no longer support this particular platform. We’ve been using the database since the 1990s, it is not cloud-based, and we are not hosted – it lives on a server in our office building. The database has over 225,000 constituent records and over 550,000 gift records. We use an import plugin tool called ImportOmatic to help ease some of the headaches related to importing data from other sources, including online donation information and data from our other databases and platforms.

**Financial Edge 7** is our financial database, and it integrates with our Raiser’s Edge 7 database in order to transfer financial transaction information directly into the database for accounting purposes. This database is also not cloud-based, and is not hosted – it too lives on a server in our office building. This particular platform will also no longer be supported by Blackbaud in the near future.
**ActionKit** is our cloud-based database platform, which we use for mass emails, online advocacy efforts, and online donations. It doesn’t integrate with any of our other current platforms. We migrated to ActionKit in 2016, and soon it will be time to reassess whether it’s still a good fit or whether some other solution is better suited for us.

**Knowlegis** is a platform used to record lobby visits and through which lobbyists send messages to congressional staffers, but it is woefully inadequate for what we need. We are desperate to find a better platform, and also one that has better integration potential.

**Capwiz** and **Engage** are used to deliver email advocacy communications from our constituents to Congress. There are limitations with these, and they don’t connect well with the rest of our technology.

*Note: Other data tools and applications are also used by FCNL, but these are the most critical ones currently being used.*

**Desired functionality in future data system**
1. Integration/connectivity between our applications/platforms
2. Continued complex gift processing and strong development-related features
3. Continued robust email communication capabilities
4. Improved advocacy management
5. Added functionality for event management
6. Added functionality for robust data analysis, visualization, and reporting
7. Ability to view constituents’ full advocacy and giving activity in one location
8. User-friendly platforms

**Constraints**

**Timing factors:** There are a couple factors that make it important to undergo this project now. One factor is our 5-year strategic plan: It will be critical to upgrade our data systems in order to support the growth and enhancement happening in the rest of the organization.

In addition, our current database of record (Raiser’s Edge) and our financial database (Financial Edge), which integrates with Raiser’s Edge, are being phased out by Blackbaud will no longer be supported in the not-too-distant future. We anticipate that the replacement databases that we will adopt will be cloud-based. Currently, both of these databases live on an internal server at FCNL that will reach its end of life in 2020. Therefore, we know we need to migrate these two existing databases in the near future, moving to cloud-based solutions prior to our server’s end of life.

**Staff resources:** There is currently one staff person devoted to organizational-wide data work. We are considering the idea of adding 1-2 more data staff who will help with this large-scale data system transformation.
PROJECT DELIVERABLES

1. Lead leadership group to identify and prioritize list of issues that need attention to achieve our goals.

2. Create documentation that summarizes:
   a. Our goals, and the priorities/sequencing of those goals
   b. Our options for configuration architecture/structure

3. Recommend more than one viable option in regards to data architecture and programs that pair with the configurations, and include a summary of pros and cons of each option. The recommendations would identify options of software and software configuration for optimal use and maximum benefit that fits with organizational needs and vision, would be flexible for continuing adaptability, and would be forward-thinking in terms of where the future of communications would be in another 5 years (for example).

4. In conjunction with recommended solutions:
   a. Provide a recommendation list of migration consultants to help move to the recommended software solutions.
   b. Provide a recommendation list of potential data consultants/vendors who’s services and expertise could be use on an ongoing basis to optimize internal resources by outsourcing specific areas of data work

5. Develop a multi-year roadmap that outlines sequencing of priorities, and includes estimated timelines for the different stages and transitions.

6. Recommend both staffing adjustments and workflow/process adjustments to compliment/pair with the software recommendations in order to obtain optimized efficiencies with new technology systems. Identify areas that we could automate and ways we can leverage the new technology better:
   a. Changes with technology and management of said technology should also then lead to different staffing needs/allocations.
   b. With these changes, how could data processes and business processes be reconfigured to leverage more efficiencies?
   c. Help us think through best practices and how we can operate and support the new set-up at the end of this process; “Once we have the keys, do we know how to drive?”

CONSULTANT QUALIFICATIONS

We are looking for a consultant who has the following set of experience and skills:

1. Has successfully led consulting projects with nonprofits that were undergoing changes in strategy and system change that are comparable to ours.

2. Has worked with nonprofits of a similar size and scope, and that have a national focus.

3. Has worked with larger nonprofits. (Our complexity level may more closely resemble a larger organization’s than ones strictly our size. Also, we want a consultant with experience working with nonprofits that are at higher levels than we are currently, as we intend to continue to
expand and this experience would help in guiding us to lay the appropriate groundwork to support us at the higher level we aspire to be in the coming years.)

4. Has worked with nonprofits that have similar advocacy and lobbying efforts, including flying in constituents from across the country for lobby visits.

5. Has a clear and stated process through which the consultant uses to generate results, and is highly organized.

6. Understands data management principles and the challenges of data integration across multiple platforms and work functions.

7. Knows current technology, data management software, and data analysis/visualization software marketed towards nonprofits, as well as general data trends within the nonprofit realm.
   a. Has experience with Raiser’s Edge (RE7 and RE NXT), and Blackbaud in general
   b. Doesn’t have one product or brand they promote to all clients, regardless of the given situation.
   c. Is familiar with a variety of data products and tools, and familiar with how they can work together so they can advise us on options for how they could best be implemented for us specifically.

8. Knows industry norms, has a sense of reasonable ROI expectations, and can give us valuable suggestions based on our specific needs and conditions.

9. Has good connections to industry contacts that can be used as resources for those areas that the consultant isn’t as familiar with.

10. Can point out areas we could automate and ways we can best-leverage the new technology. (With different technology in place, this could lead to a change in staff resourcing needs, reconfigured business processes, and best practices.

11. Can guide the group into thinking through best practices and how we can operate in, and support, the data system we adopt while working with the consultant.

12. Has the ability to see big-picture and a vision of where FCNL could be and how to get there.

13. Has the fortitude to address the situation if we have too many (and/or unrealistic) expectations.

REQUESTED INFORMATION

Proposals should include the following:

1. A description of the consultant or firm, including a brief history of the company, identification of applicant’s skills and experience relevant to project and working with FCNL

2. List of staff and resources to be assigned to this project, including resumes, titles, responsibilities and relevant experience

3. 2-3 references, including contact information from nonprofits that have previously worked with the consultant

4. Examples of previous, similar projects

5. An outline of proposed work plan, including timeline and process of how deliverables will be met

6. Quoted consultation fees and project costs

7. A sample of your service contract with any additional stipulations of which we should be aware
8. Terms and conditions

**SUBMISSION**
Proposals, including any attachments, should be sent electronically in PDF format to: sara@fcnl.org. Please include in the subject line: RFP Data Strategy.

During the week of March 5th, FCNL will set aside some time for scheduled informational discussions with interested parties, as availability allows. This will be a chance to ask questions and to get a better sense of the project, which will hopefully lead to proposals that are better tailored to the project. Please contact sara@fcnl.org to schedule an informational discussion.

After a final selection is made, FCNL will notify all who submit proposals that the search for a consultant has concluded.

Thank you for your interest. We look forward to your response. If you have any questions, please contact Sara Robich, Database Manager, at sara@fcnl.org.