ADDENDUM #1

RFQ No:	2024-01
RFQ Title:	Customer Relationship Management (CRM) System for Non-Profit Organization
Questions Deadline:	March 27, 2024, at 6:00pm (CST)
RFQ Due Date:	April 4, 2024, at 6:00pm (CST)

Addendum #1 is issued by the ChildCareGroup Procurement Office. Please see the following for changes, additions, deletions, and/or clarifications to the specifications:

CHANGES
The due date and time for this solicitation has been extended to April 8, 2024, at 6:00pm (CT). Responses received after this due date and time will not be accepted.

CLARIFICATIONS

Q1. Is this RFQ a standalone request that could lead to a direct contract?
A1. Yes

Q2. To allocate enough time to create a compelling bid, would ChildCareGroup consider extending the due date for proposal submission deadline?
A2. Yes, see new due date under "Changes."

Q3. Does ChildCareGroup have a budget? If so, please identify the budget allocation and any budgetary constraints.
A3. No budget can be specified at this time.

Under the General Tab of Attachment 1:

Q4. Question 5.00: Is there a fundraising tool that you use today that you would be looking to integrate with HubSpot?
A4. Our current CRM (Abila) is outdated and not useful so no, we would only be exporting information out of that platform and canceling that agreement.

Q5. Question 8.00: Can you please provide the general use case for document and file management?
A5. This could include documentation of contacts on a form that is stored, general case notes, copies of correspondence, visit reports, forms, applications, and general correspondence that are time specific.

Q6. Question 9.00: Can you please provide more clarity on what you mean by version control?
A6. Track changes to files over time.

Q7. Question 11.00: What is document imaging?
A7. Ability to convert Information on paper to digital.

Q8. Question 14.08: Do you use a current webinar tool today?
A8. We currently use Zoom and Microsoft Teams.

Q9. Question 15.07: What are some scenario examples?
A9. Requests for information, auto-generated reminders/communication, thank you emails, event reminders, keeping track of donations. This refers to auto-generated communications for tax letters and acknowledgements for donations, events, and other fundraising activities.

Q10. Question 15.11: What are you looking to customize? Can you give more details about the portal?
A10. We thought each business unit would have to be customized to that department's needs and our ring central integrated/connected.

Q11. Question 16.01: How do you track time today? Any tools today?
A11. We currently have an in-house system that dates stamps notes, requests, uploading of documents, etc. It also has an amount of time assigned to each task that allows management to review staff productivity. We are looking to add this feature.

Q12. Question 16.03: Can you please give an example of an activity set?
A.12. Entering the same tasks or events day after day or week after week, an activity set would generate a collection of tasks and or events in one step.

Q13. Question 16.05: Can you please give an example of a custom milestone?
A13. A way to help track progress on different tasks

Q14. Question 16.06: What types of documents for document management and collaboration?
A14. Texas Rising Star Interest Forms, Shared Documents, Excel and the ability to take the data housed in Smartsheet with its automations (emails, date triggered messages, reminders) to sync with the data in the CRM.

Q15. Question 17.01: What version of outlook?
A15. We utilize O365 so it's always the current version

Under the Technology and Security Tab of Attachment 1:

Q16. Question 9.18: What level of sensitive information are you looking to include?
A16. Customer's personal information, ex: SSN and banking

Under the Investment Summary Tab of Attachment 1:

Q17. Can you please break down the job roles of the employee users? For example, how many would need access to marketing features vs services features?
A17.
Marketing - (4 staff)
Vice President
Donor Relations Coordinator
Event Coordinator
Marketing & Communications Specialist

Services - (35 staff)
Provider Services Rep
Provider Services Supervisor
Outreach & Recruitment Coordinator
Manager
Director

IT - (2 Staff)

Q18. How many contacts are you planning on marketing to? What is your email send volume? Will all your emails be marketing emails or are you planning on sending some transactional emails such as "thank you for your donation."
A18. We currently have over 10,000 profiles in our database. We use Mailchimp and Paperless Post to send email communications to various audiences for updates and events.

Q19. Are you planning on using internal resources for implementation or would you like us to recommend a 3rd party partner?
A19. Recommend a 3rd party partner.

Q20. What is your timeline for evaluation, implementation and go-live? Our pricing can change so it is important for us to know when you are targeting to be live so we can provide accurate pricing.
A20. Currently, we do not have a definitive date.

Please sign below and include Addendum #1 with your proposal response. Failure to include the signed Addendum #1 may deem your proposal non-responsive.

For Questions regarding this addendum contact:
Anna Alvarez
Procurement Specialist
procurement@ccgroup.org

_____
Signature

_____
Date