



Database Contractor - Request for Proposals

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Overview

Human Impact Partners seeks an independent contractor to help us identify and implement a CRM/database solution for our organization. Our budget for this project is approximately \$25,000. We would prefer to work with one contractor through the entire process and, depending on the results, would consider an ongoing maintenance contract once the solution is up and running.

About Human Impact Partners

Human Impact Partners (HIP) works to transform the field of public health to center equity and build collective power with social justice movements. We are a national organization with staff across the country, headquartered in Oakland, CA.

HIP uses advocacy, organizing, policy-driven research, and capacity building strategies to transform public health practice and advance equitable policymaking at the local, state, and federal level. We focus on key determinants that affect health: community safety and immigration (through our Health Instead of Punishment Program), economic security, and housing, land use, and transportation.

For more details about HIP and our approach, visit: www.HumanImpact.org.

Contract services requested

HIP works with organizational partners in government, nonprofit, and higher education as well as individual public health professionals. For scale, our organizational budget is \$3 million total and we are growing to 20+ staff for the first time this year. We have approximately 10,500 contacts on our email list, another 3,500 in our organizing network, and work with roughly 30-40 organizational project partners each year, not counting advocacy coalition partners.

Currently we are tracking our collaborations in separate systems (MailChimp, ActionNetwork, Google sheets) which prevent staff from easily seeing which of our contacts are active in multiple programs. We are seeking a solution that will allow us to knit together all our contacts (both organizations and individuals) and track their involvement as clients, participants, and donors, in one system that is accessible to all staff.

HIP is seeking support for two phases of this project, described below. We will initiate this project as soon as we confirm a contractor, with the goal of completing the project by August 2022. Interested contractors should describe their ability to support each phase of the project and a fee breakdown for each.

1. Identify a right-sized CRM/database for our organization

- Gather background information on staff data management and sharing needs, as well as existing systems
- Develop a comprehensive list of CRM products that could meet these needs, including resources needed for set-up and ongoing maintenance
- With staff guidance, select 3-4 of these potential solutions and conduct a thorough analysis to compare their ability to meet HIP's specific needs
- Discuss the results with staff and provide recommendations for the final choice

2. Implementation of selected CRM/database

- Develop a comprehensive plan for implementation and ongoing maintenance of the selected solution
- With staff support, lead implementation process including CRM data structure set-up, population of data into the system, creation of commonly used reports, integration with email marketing tool(s), and development of data management protocols
- Troubleshoot challenges that arise through the implementation process and fix them
- Train staff to use the new system, including creation of instruction guide/training materials
- Revise ongoing maintenance plan to reflect adjustments made in the implementation process

To submit a proposal

Please provide a one-page proposal describing the following:

- Your qualifications for this project, including:
 - Which CRM/database solutions you have worked with and in what capacity (ie development, installation, maintenance)
 - Your experience working with small to mid-sized nonprofits
 - Your communications and collaboration style and needs
- Your availability to work on this project (how soon can you start, any constraints on your time in the coming 6 months for other projects/vacation/etc)
- Estimated fees required
- Three references from prior clients

Please email your proposal with the subject line “CRM contractor” to database@humanimpact.org. Proposals will be reviewed beginning February 1 and then on a rolling basis until we identify our vendor.

Human Impact Partners is an Equal Opportunity Employer. We strongly encourage people with lived experiences related to the issues we work on (such as community safety, economic security, immigration), people of color, people with disabilities, and LGBTQ+ folks to partner with us. We do not conduct criminal background checks on candidates for staff or contract positions.