



REQUEST FOR INFORMATION

Alliance for Education Data Systems Improvements

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Introduction

The Alliance for Education (www.alliance4ed.org) is an independent, non-profit organization. Our mission is to support excellence in education by advancing educational justice and racial equity for students in Seattle Public Schools (SPS). Our vision is of a deeply invested community that collectively ensures all students in SPS experience a sense of belonging, receive an excellent and equitable education, and reach their fullest potential. The Alliance for Education was established 25 years ago to engage the broader community on behalf of SPS students, and has consistently convened stakeholders, raised dollars, and created innovative programs designed to support student success.

We are in search of an experienced systems planning consultant to help us identify and implement targeted cloud-based solutions for accounting and customer relations management systems and processes.

We're issuing this request for information to make the selection process efficient for consultants and ourselves. Thank you for considering our project.

Where We're At

Overview and context

The Alliance shifted abruptly to a remote work environment at the start of the pandemic. We improvised under time and budget constraints and arrived at systems that essentially replicate our former highly paper-based processes.

The Alliance directs a broad range of programs, including two that provide high-touch services to customers and have specific systems tracking and reporting needs -- The Right Now Needs Fund which disburses support for basic needs for student and families within all 104 schools in the district and our Fiscal Services Program which raises funds and disburses support for more than 100 school-house based groups.

Our current systems provide functions and data segmentation to meet the basic needs of our programs – including tracking and report on expenses by fund/restriction, program, school, and grant levels. We seek efficiencies and enhancements in data entry, document management, approval systems, reporting, and data access for Alliance staff and the external constituents we support.

We're eager to implement and embrace technology improvements and streamlined processes, and we also recognize that we serve a broad range of external constituents and need options to meet them where they are in their use of technology.

Staffing

We like to say the Alliance staff is small but mighty. However, we recognize we could be mightier. Our current systems do not allow us to utilize our time and skills most effectively. There are currently 13 members of the Alliance team across functions as follows:

Accounting, Operations & Fiscal Services: 3
Advancement: 3
Executive: 1
Program Staff: 6

Our IT services are provided by an independent contractor.

Current Systems

Accounting System: Abila MIP Fund Accounting (on-premise)

Customer Relations Database (CRM): Blackbaud Raiser's Edge (on-premise)

Integration: Currently all donations (including on-line) require manual entry to our CRM. Donations are batched in the CRM and manually entered to the accounting system at the batch level.

Document Management: email, pdf, stored on server

Approvals: email, pdf

Payments: checks w/ manual signatures

Donations: check, third-party (Greater Giving, Paypal, others), on-line via website

Reporting: Internal – accounting and CRM staff pull reports for staff and customers. Comprehensive reporting for customers requires pulling reports from both RE (using Crystal reports interface for large pulls) and MIP and manually collating and sending via email.

Volume of services

During 2021 we processed:

- 3,815 gifts totaling \$3.75 million.
- 1,550 payment requests totaling \$5.3 million.

Where We Want to Be

Overview

While affordability will be an important factor in our systems solutions, we're also excited to engage in a discovery process that helps us dream big to find technology systems solutions that will power our work into the future.

We seek the efficiencies, effectiveness, and improved working environment of well-integrated systems. If a single system will not meet our needs or is cost prohibitive, and a suite of systems is required, those components should be tightly and efficiently integrated.

Systems and processes for assessment

1. Accounting Systems, including
 - AP Process Automation
 - Document management system
 - From compiling attachments for incoming requests through records storage and retention
 - Options for customer request submission on-line and via simplified email system
 - Auto-response for receipt of request
 - Auto-response for payment completed
 - Approval process system
 - From pre-approval through payment
 - E-payments or third-party check services
2. Customer Relationship Management Systems, including
 - Integration with on-line donation page to reduce data entry
 - Grants Management including portfolio management and proposal process and approvals tracking.
3. Reporting and data/information access
 - User-friendly customizable dashboards for Alliance staff (by school, program, etc.)
 - Ideally a one-stop-shop for users to view all items in process

- Simplified reporting for donation detail and expense/financial detail with on-line or auto-email delivery for fiscal service accounts and other customers

Deliverables and Project Outline

We expect the following deliverables:

- Needs assessment demonstrating an understanding of our systems, work processes and needs.
- Recommendations, including technology solutions, why they are right for us, potential pitfalls, solid cost estimates (including staff resources and cost of migration management), and implementation outline with estimated timeline.
- Presentation of recommendations overview to Finance & Audit committee.

We look forward to the guidance of our experienced consultant to develop a detailed project outline. We are confident that there are additional important details to consider, but with what we understand now, we envision a process similar to the following:

Phase 1: Discovery/Needs Assessment – gain and demonstrate an understanding of our current systems and needs.

Phase 2: Research -- gather a suite of viable options for consideration.

Phase 3: Vet - guide our evaluation and selection process.

Phase 4: Plan – develop an implementation plan and timeline.

Phase 5: Implementation – provide high-level oversight of implementation.

We're excited to have the improvements as soon as possible but will need the expertise of our consultant to help us determine a well-paced timeline that considers our staff capacity and workflow.

Budget

We are expecting fees between \$10,000-\$20,000. We are willing to take on tasks and homework such as staff surveys and information gathering. But we need help driving the process.

How to Engage

The following submission guidelines are designed to keep the process simple, provide consultants with the information they need to evaluate the project and to help us evaluate potential consultants efficiently and fairly.

If you are interested in our project, please let us know and submit any questions via email **by July 25th**: amy@allianceford.org

By **July 29th**, we will respond to questions and send our responses to all who contacted us to express interest.

By **August 8th**, please email a letter or document to amy@allianceford.org. The letter or document should include the following:

- A brief description of the services you offer and your experience.
- A brief description of the process and approach you might recommend. We're looking for general information (not free advice) that will give us a sense of what it's like to work with you.
- What you will need from Alliance for Education to ensure the project's success.
- A ballpark budget estimate.

We anticipate submissions being from one to five pages long.

After August 8th we will review submissions and choose a few consultants to talk with. We will try to not take up a lot of your time as we understand this is a small contract. We aim to have a consultant selected and confirmed by August 31st.

Date	Milestone
July 25	Consultants will have submitted any questions
July 29	We will have replied to questions
August 8	Consultants will have submitted information
Aug 9	We will begin conducting brief video calls with three to four consultants
August 31	We will have selected a consultant and confirmed their willingness to engage

When evaluating consultants, we will consider the following factors:

- The consultant is experienced and credible, can describe past successes with similar projects, and can provide references.
- The approach is comprehensive, demonstrates understanding and we believe it to be practical and in keeping with our objectives.
- The approach is affordable and a good value

Thank you for your interest!