

RFP: Salesforce NPSP Evaluation & Optimization

Opportunity

The Myotonic Dystrophy Foundation (MDF) would like to engage a Salesforce focused Developer or Agency to evaluate MDF's current utilization of the Salesforce Non-profit Success Pack, identify areas for process improvement, and create a transition plan to adopt their recommendations.

About the Myotonic Dystrophy Foundation

Founded in 2007, MDF is the leading global advocacy organization helping families and professionals understand DM, a rare, genetic, multisystem, highly variable neuromuscular disease. MDF helps constituents identify resources and support, improve quality care, and advance research for management and cures. MDF has a global reach, assisting families and championing other advocacy organizations in more than 80 countries around the world. As many as 150,000 individuals may be at risk for the most common form of DM in the United States alone. Tens of thousands of affected families as well as providers, industry partners, researchers, and donors, together, form the MDF.

Vision: We envision a world with treatments and a cure for myotonic dystrophy (DM).

Mission: The MDF mission is Community, Care, and a Cure.

- We support and connect the myotonic dystrophy community.
- We provide resources and advocate for care.
- We accelerate research toward treatments and a cure.

Goals

MDF recently completed a Strategic Planning initiative to identify operational priorities for the next 3 years. Through this process, it became clear that MDF needs to evaluate its current digital strategy to ensure its efficiency and alignment with its new Vision and Goals.

Project goals include:

1. Engage in an assessment of current digital process and strategy
2. Identify opportunities to adopt to best practices and improve efficiency
3. Plan, develop, and execute a transition plan for new processes
4. Create documentation based on user roles to ensure new paradigms are properly adopted and maintained after project completion.

Scope

MDF seeks to increase operational efficiency by building upon our existing database and processes within the Salesforce CRM.

The ideal proposal will help ensure MDF is leveraging its CRM software to its full potential in order to improve staff efficiency and community satisfaction in program delivery, segmented/personalized communications, and donation processing.

MDF currently treats Salesforce as its single source of organizational truth for documenting interactions with our served community, donors, partner organizations, and grantees. While we are currently utilizing Salesforce, we hope to drive decision making and improve our service through measurable feedback loops. Familiarity with health-focused organizations, revenue diversification, and knowledge and experience conducting multi-channel communication plans required.

We would like to include, but not be limited to, the following during the scope of this project:

1. Work collaboratively with MDF Staff to analyze and document current core business processes, audience journeys, and data models used in Salesforce
2. Determine if other MDF processes/programs would benefit from management within Salesforce.
3. Identify opportunities to adopt best practices & streamline/automate processes using Salesforce. Areas to consider:
 - a. Program Delivery
 - i. Warmline case management
 - ii. Resource delivery and feedback measurement
 - iii. Volunteer coordination
 - iv. Impact reports and quick status dashboards
 - b. Communications / Marketing
 - i. Email marketing from Salesforce vs MailChimp
 - ii. Social Media engagement / measuring impact
 - iii. SMS campaigns
 - iv. Personalized communications
 - v. Lifecycle & re-engagement automations
 - c. Donations / Development
 - i. Donor engagement plans
 - ii. Look-a-like analysis on high value donors

- iii. Real time pledge and donation dashboards
- iv. Automated Thank you email & physical letters
4. Leverage web forms on myotonic.org and email templates to create sales funnels, process triggers, and data collection points
5. Create documentation to expand Salesforce offerings as new services and programs are created by MDF.
6. Create process documents for staff roles in Administrative / Quality Assurance, Development, Program, & Communications.
7. Ensure all legacy database information is properly transitioned to the new data model as required

Proposal Guidelines and Submission Process

Proposals will be submitted through Jan 31st with interviews held through Feb 15th. We hope to select a consultant and begin the project by Mar 1st.

Proposals should be sent directly to Kleed Cumming, MDF's Technology and Communications Manager at kleed.cumming@myotonic.org.

Proposals should include the following information:

- Detailed timeline and budget containing all costs, including staff time and projected communication
- An explanation and steps associated with evaluating our MDF's current Salesforce utilization
- Your company history
- A portfolio with samples of past work, with a specific focus on non-profit clients
- Description of standard development and support methodology
- 3 References