

# **East Bay Regional Park District**

## **R E Q U E S T F O R P R O P O S A L**

### **For Customer Relations Management System (CRM) Planning, System Assessment, Selection, and Implementation.**

Contact:

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***Proposals Due:  
April 30, 2025, no later than 5:00 pm***



## **REQUEST FOR PROPOSAL FOR CONSULTING SERVICES FOR CRM SYSTEM ASSESMENT, SELECTION AND IMPLEMENTATION**

### **A. Statement of Purpose**

East Bay Regional Park District (Park District) is inviting qualified firms to submit proposals for consulting services for Customer Relations Management (CRM) System Assessment, Selection, and Implementation. The Park District is requesting proposals from qualified firms with proven experience to conduct a needs assessment for a newly implemented CRM system, draft a request for proposal (RFP), assist in evaluating proposals, and provide advisory and project management support during implementation of the new CRM solution.

The desired implementation of a Customer Relations Management System (CRM) at East Bay Regional Park District will allow staff as internal users to manage interactions with its diverse community of stakeholders to amplify and extend the ability to reach with the Park District's services. This minimal database system will allow for the centralization of key stakeholder organization contact information, tracking information and update interaction information in the following categories: Lead management, contact management, agreement and contract management, and general contact management.

### **B. Park District Background**

The Park District was incorporated in 1934 as a California Special District and operates under Sections 5500-5595 of the Public Resource Code of the State of California. It is a legally separate and fiscally independent entity from other government agencies, with capacity and authority to issue its own debt. The Park District's purpose is to acquire, develop, and maintain parks, recreation and open space lands within Alameda and Contra Costa counties.

The Park District manages a system of beautiful parklands and trails, including over 126,000 acres in 73 parks, and over 1,300 miles of trails. It is governed by a seven-member Board of Directors, elected by voters in their respective wards and serving a four-year term. The District has 978.5 budgeted full-time equivalent positions (FTEs) and a head-count of over 1,000 employees.

The Park District's 2025 Operating Budget is \$316.0 million, and over 92% of General Fund revenue is generated from property taxes. The Park District's 2025 Proposed Budget and Annual Comprehensive Financial Reports (ACFR) are available on the website: <http://www.ebparks.org/about/budget>.

The Park District currently does not have a Customer Relations Management System or a centralized method to track interactions with community partners across various teams and departments. Departments at the Park District use various systems to save contact information or partner coordination information, with most of the information being saved in separate excel spreadsheets and other single document sources that do not allow for the ability to log partner contact information, recent partner communications in real time, or for cross divisional organization or tracking. Other departments utilize the Asana Software to manage projects and tasks. The Reservations department utilizes ActiveNet for picnics, permits, activity registration and Reserve America for camping reservations.

The Park District seeks a Customer Relations Management System to be able to have a centralized database to manage interactions with its diverse community of 450-500 stakeholders to amplify and extend the ability to reach with the Park District's services. This data base should also allow for the input of new stakeholder groups as the Park District continues to expand.

## **C. Scope of Work**

### **Task #1: Needs Assessment/Gap Analysis**

Evaluate and conduct reviews of the Park District's existing business processes and systems; determine and document the functional and technical system requirements necessary to implement the CRM System. Evaluate other applications and systems in use by the Park District that might be replaced, interfaced, or integrated with the CRM solution.

#### **Deliverable:**

Needs Assessment/Gap Analysis report which should include business practices, process diagrams, areas that needs are not being met by the current business processes and opportunities for improved business process changes that will assist in the adoption of best practices common to CRM applications.

### **Task #2: Develop a Request for Proposal**

Using the results of Needs Assessment/Gap Analysis develop a request for proposal (RFP) that incorporates the Park District’s functional and technical requirements, structured list of items for vendors to address in their responses, and evaluation criteria.

**Deliverable:**

Completed RFP to solicit a vendor to implement a customer relations management software system that meets the needs of the Park District.

**Task #3: Evaluation and Selection of Vendor**

Assist the Park District staff in the RFP selection process which may include responding to vendor questions and developing RFP addenda, coordination of onsite vendor demonstrations and any other follow-up actions. Facilitate the Park District staff’s proposal review process by aiding in analyzing vendor proposals to identify any potential risks or issues and assess vendor’s ability to meet minimum requirements.

**Deliverable:**

Proposal Summary report that analyzes each vendor based on RFP requirements and Park District objectives.

**Task #4: Action Plan to Integrate the CRM Solution Implementation Plan**

Develop a comprehensive project action plan that integrates the CRM vendors implementation plan with the Park District’s, which shall include all implementation tasks, deadlines, milestones, Park District staff resources required, and time allocations. The plan should prioritize delivery of functional components based on the Park District’s goals and objectives.

**Deliverable:**

Detailed action plan that combines selected vendors implementation plan with Park District’s resources and phases for deployment of each functional area.

**Task #5: Advisory and Project Management Support**

Provide project management support and advisory services as requested by the Park District. Specific tasks and deliverables will be determined after CRM vendor selection and based upon gaps identified in Task #1.

**D. RFP Calendar**

<b>TASK</b>	<b>DATE</b>
RFP Issued	April 2, 2025
Deadline to Submit Questions	April 15, 2025 (5pm)
Proposal Submission Deadline – proposals should be emailed to <a href="mailto:agallo@ebparks.org">agallo@ebparks.org</a>	April 30, 2025 (5pm)
Evaluation of Proposals/ Optional Interviews	Week of May 5, 2025
Executive Committee Recommendation re Award of Contract	June 11, 2025
Board Meeting for Authorization of Award of Contract	June 17, 2025
Contract Finalization	June 30, 2025

## **E. RFP Questions**

Questions concerning this RFP and the selection process shall be submitted by email to Amanda Gallo [agallo@ebparks.org](mailto:agallo@ebparks.org). Questions will not be taken or answered verbally. No other Park District source is authorized to give information concerning the RFP document or to be contacted about this RFP.

Questions should be submitted to the Park District via email to [agallo@ebparks.org](mailto:agallo@ebparks.org) no later than Friday, April 15, 2025, at 5pm.

## **F. Requirements**

To be considered for selection, proposing firm must meet at least the following terms and conditions:

- Must have a minimum of five (5) years' experience providing similar professional services as outlined in the Scope of Work with government projects.
- Must declare that no undue influence or pressure, including coercion, confidential financial arrangement, or financial inducement, is used against or in concert with any officer or employee of the Park District in connection with the award of the contract. No officer or employee of the Park District will receive compensation, directly or indirectly, from the respondent, or from any officer, employee or agent of the vendor, in connection with the award of the contract which will be executed as a result of this RFP. Violation of this section shall be a material breach of the contract entitling the Park District to any and all remedies by law or in equity.
- Must declare no professional or personal financial interest, which could be a possible conflict of interest in representing the Park District. The Park District also requires the firm to further disclose arrangements to derive additional compensation from various investment and reinvestment products, if applicable. The Park District may reject a Proposal from any firm that, in the Park District's opinion, would be in a conflict of interest if the firm is awarded a contract.

## **G. Proposal Format and Contents**

Firm's proposal shall be submitted in several parts as set forth below. The firm's proposal in response to this RFP will be incorporated into the final agreement between the Park District and the selected firm. The submitted proposals should include each of the following sections:

- I. Transmittal Letter – 1 page maximum.** The letter should address the firm's interest and commitment to perform work necessary to provide consulting services as described. The person authorized by the firm to negotiate a contract with the Park District shall sign the letter.

2. **Qualifications – 4 page maximum.** Provide an overview of your firm, including a succinct description of capabilities, and specific qualifications to perform work as described above. Describe your firm’s experience with at least three similar projects (e.g. agency size, existing CRM system) highlighting scope of work performed, project team members, schedule, and costs.
3. **Project Approach – 2 pages maximum.** Describe your firm’s approach, including the process, steps, and timing for providing the requested deliverables as detailed in the Scope of Services (Section C).
4. **Project Team Staffing – 4 page maximum.** Identify the person who will serve as the primary point of contact with the Park District. Provide information about other key personnel who will be actively involved in working with the Park District, including name, role, responsibility, experience and length of tenure with your firm and experience with public agencies. Provide a list of major projects both ongoing and planned to which the proposed team members are committed to during the time frame of this project, status of project, and estimated team member time commitment. Include résumés of key personnel as an attachment. If awarded the contract, no staffing substitutions shall be made without the District’s approval.
5. **References - 1 page maximum.** Provide a minimum of three (3) client references that are similar in size to the Park District. Include brief description of work performed, role of your firm, proposed team members that were involved and their role, and project duration. For each reference, please include the name of reference, organization, address, email address, and telephone numbers of individuals qualified to provide information from management/technical viewpoints.
6. **Detailed and Itemized Pricing – 1 page maximum.** Provide proposed project fee separated by Task # and include hourly billing rates for the proposed personnel that determine the fee and any proposed increases in such rates during the term of the contract, and the types of reimbursable expenses with proposed charges.
7. **Affirmations – 1 page maximum.** Affirm that your firm meets the “District Requirements” as stated in Section F, or indicate in which areas the firm cannot comply. Include the statement confirming “no undue influence” and “no professional or personal financial interest which could be a conflict.” Affirm that your firm will be able to meet the conditions specified in the District’s Professional Services Contract (Appendix A) or provide your proposed modifications to the contract.

## **H. EVALUATION OF PROPOSALS**

Award of the contract resulting from this RFP will be based upon the most responsive firm whose offer will be the most advantageous to the Park District in terms of experience and qualifications of firm and assigned personnel, cost, understanding of the Park District, ability to provide services outlined in Scope of Services, and other factors as specified elsewhere in this RFP. The Park District reserves the right to:

- Reject any or all bids and discontinue this RFP process without obligation or liability to any potential vendor.
- Accept other than the lowest priced offer.

## **Appendix:**

A. Park District's Standard Professional Services Contract