



Parents as Teachers National Center, Inc.

Request for Proposal for CRM System Selection April 24, 2025

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CRM System Selection RFP

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PARENTS AS TEACHERS NATIONAL CENTER BACKGROUND

Parents as Teachers is a nonprofit organization supporting parent education services to families prenatally through kindergarten. Parents as Teachers programs are in all 50 states and 6 countries, within a variety of agencies such as health departments, school districts, and community agencies. The Parents as Teachers National Center (PATNC) (www.parentsasteachers.org) serves as the model and curriculum developer, and provides training, resources, and implementation support to professionals from the fields of social work, early education, and health.

Our work is carried out by a network of affiliates (conceptually similar to franchises). The staff who work directly with families and children are called Parent Educators and the home visits include health, hearing, developmental, and vision screenings. There are also group connections (meetings) and referrals to local resources where appropriate. The PAT network of affiliates is about 860 organizations with over 8,300 parent educators serving over 172,000 families.

The Parent Educators are trained by us to learn how to do this work using our online Curriculum, which is our Intellectual Property. The PAT Engage mobile app (currently in limited release) will eventually be made available to the entire PAT network of affiliates. PATNC has approximately 100 employees on staff across the USA.

PROJECT SUMMARY

PATNC is embarking on a digital transformation that includes replacing the long-time association management system (AMS), Momentive's Aptify. Aptify has been in use for 13 years and it no longer meets the needs of the organization. PATNC would like assistance in finding a customer relationship management (CRM) platform that can best support PATNC's needs including integrating with other best of need solutions (e.g., event registration system, learning management system).

We are looking for assistance with the selection process that includes the following:

1. Identify key functional, and non-functional (e.g., performance, security, usability, reliability, and scalability) requirements and work with PATNC to prioritize them
2. Identify possible CRM solutions that could meet PATNC's need
3. Establish evaluation criteria of the possible solutions
4. Schedule and facilitate system demonstrations
5. Facilitate PATNC's evaluation of the alternatives
6. Document the system selection rationale

For an abbreviated list of current key systems, see *APPENDIX A: PATNC DATA SYSTEMS*.

DELIVERABLES

PATNC expects to receive a written report or presentation that includes the following:

1. System requirements
2. List of possible solutions with a summary of features and costs comparisons
3. Evaluation criteria
4. System selection rationale
5. A high-level implementation timeframe for the selected system

PROPOSAL REQUIREMENTS

COMPANY BACKGROUND

Please tell us about your company background and why you would be a good partner for Parents as Teachers in this project.

COMPANY INCLUSION

Please tell us about your company's commitment to Inclusion including some examples.

YOUR METHODOLOGY

Please tell us about the approach and process you use to work through and manage a project like this, including how you will track, manage, and share progress and communicate the status.

COST ESTIMATES AND ESTIMATED TIMELINE

Provide a cost range to complete this project and an estimated schedule with key milestones.

KEY TEAM MEMBERS

Please tell us professional qualifications for members of your team who might be assigned to this project.

ADDITIONAL CONSIDERATIONS

Please list additional considerations not included above which you feel need to be discussed and/or refined as part of the system selection process.

SUBMISSION REQUIREMENTS

Submissions should include references and be in Microsoft Word or Adobe PDF format and sent to rfpsubmissions@parentsasteachers.org

As noted below, we are providing time for questions to be submitted via email about anything provided here. All questions received will be de-identified, and the questions and answers provided to all potential partners.

SUBMISSION TIMELINE

Dates are subject to change and will be communicated to all should a change occur.

ACTION	DATE
RFP Issued	4/24/2025
Questions due from applicants. Questions submitted via email to rfpsubmissions@parentsasteachers.org	5/5
Responses to questions shared with all applicants	5/7
RFP submissions due. Email to rfpsubmissions@parentsasteachers.org	5/19
Internal review and discussion	5/19 - 5/23
Finalist presentations	5/27 – 5/30
Reference checks	6/2 – 6/6
Announce selection	6/6

APPENDIX A: PATNC DATA SYSTEMS

System Name	Developer (company)	Purpose	Notes	Audience	System Type
Adestra	support from Highroad Solutions	Mass email communications, eNews, email marketing Manages opt-out functions, tracks email stats	One-way integration from Aptify to Adestra Unsubscribes are not updated in Aptify	All staff, affiliates, as well as other supporters	SaaS
Aptify AMS	Momentive	CRM, Online Portal, education management, LMS and database of record		Staff and Affiliates	COTS-Customized
Aptify eBusiness	Momentive	Ecommerce	Sitefinity drives the capabilities here.	Staff and Affiliates (Staff admin)	COTS-Customized
Aptify Learning Management System	Momentive	Learning Management System	integrated as a module of Aptify	Affiliates (Staff admin)	COTS-Customized
Azure Data Warehouse	Microsoft	Warehouse for family level data and stats from Penelope	Does NOT have any connection to Aptify. Feeds to Power BI and Retool	Staff	Custom-Built
Content and Digital Asset Management (CMS/DAM)	Canto	Content and digital asset management	Does not have any connection to Aptify. in production	Other Constituents	COTS
Cvent	Cvent	Event registration for conference	will have some kind of connectivity with Aptify	Affiliates (Staff admin)	SaaS
DonorDock	DonorDock, LLC	main website payment system and replaced PayPal. It uses a field mapped excel or Google Doc moving data from Aptify to Donor Dock that was created by IT	It uses a field mapped excel or Google Doc moving data from Aptify to Donor Dock that was created by IT	Staff	SaaS
PAT Engage (Mobile App)	Moxo Inc.	Parents As Teachers parent-facing App (supports communications between Care Giver and Parent Educator)	The PAT Engage app is used by affiliates and their staff; data is fed from Aptify.	Affiliates (Staff admin)	COTS-Customized
Good Grants	Creative Force, Inc.	Used for managing grants received by PATNC		Staff	SaaS
Google Analytics	Google	Digital analytics	Does NOT have any connection to Aptify.	Staff	SaaS

System Name	Developer (company)	Purpose	Notes	Audience	System Type
Key Survey	WorldAPP	Survey software to collect, manage, analyze information Integrated to pre-populate known data for survey recipients Instrumental in collecting/passing data for annual APRs	Key Survey-Penelope integration is PATNC's most complex integration Used for other surveys, e.g., feedback from training participants	Affiliates (Staff admin)	SaaS
Melissa Data		Address validation	We need address validation in a new system. Melissa is one vendor, but we're not tied to them if a new system has address validation. We could also select a new vendor if needed	Staff	SaaS
Microix Budget & Purchase Orders	Microix	Budgeting, Purchase Orders	Connected to MIP - no integration with Aptify	Staff	COTS
MIP Fund Accounting	Momentive	Financial Management System (FMS)	Receives transaction detail from Aptify; Prefer Summary Project codes in MIP pushed to Aptify	Staff	COTS
NxtBook Online Curriculum	Nxtbook Media	Digital Content Platform for Parents as Teachers Curricula	Efforts are under way to move content to a CMS to enhance accessibility, features, user experience (UX)	Affiliates (Staff admin)	COTS
PayPal payment processor	PayPal	Online transactions	Current config not well-suited for fundraising; PayPal is only used for transactions that want to pay with their PayPal account	Affiliates (Staff admin)	SaaS

System Name	Developer (company)	Purpose	Notes	Audience	System Type
Penelope 3.0	Bonterra (formerly Social Solutions)	Case Management System for Family Level Data	Strict security required Family data is not stored in Aptify Aptify data drives access permissions Family data to Azure data warehouse, to Power BI and Retool Data for affiliate performance reports (APR) transfers via Web Service to Key Survey. Submitted APR data from Key Survey to Aptify Penelope stores permissions for Affiliate access to Power BI	Affiliates (Staff admin)	SaaS
PowerBI Reporting	Microsoft	Family data reporting	Does NOT have any connection to Aptify. Penelope stores permissions to PowerBI One free license per Affiliate; Fee for add'l licenses Funder Reporting Corporation (Connor Nash, CEO) manages Power BI reporting from Penelope data	Affiliates (Staff admin)	COTS
Retool	Retool, Inc.	Targeted reporting for funders to view sponsored program activity	Does NOT have any connection to Aptify. Family Resource Company, (Connor Nash) - Uses Retool PATNC considering moving funder reporting to Power BI	Affiliates (Staff admin)	SaaS
Sitefinity CMS	Progress Software Corporation	Online Portal	Sitefinity is NOT using Aptify controls for most of our work. Aptify controls level 1 access to the portal and level 2 permissions access to portal and workspaces within portal	Staff	COTS
Square payment processor	Square	Primarily for onsite purchases	Does NOT have any connection to Aptify.	Affiliates (Staff admin)	SaaS

System Name	Developer (company)	Purpose	Notes	Audience	System Type
Stripe		For any payment type except for PayPal, Stripe is used	For credit card, Apple pay or other cash app options, or to initiate a direct bank transfer.	External	
Survey Monkey	Momentive	Conference evaluations Speaker/Presenter evaluations	Does NOT have any connection to Aptify. Key Survey may also be used for Conference surveys	Affiliates (Staff admin)	SaaS
VistTracker	DataKeeper	Family data reporting	Will be replacing Penelope with similar functionality	Affiliates (Staff admin)	COTS-Customized
VoterVoice	FiscalNote	Grassroots advocacy and engagement	VoterVoice stopped supporting existing integration Offers an API that PATNC can leverage in future	Affiliates (Staff admin)	SaaS
WordPress CMS	WordPress.Org	Public site	Managed by either MarCom or Upbrand. Only the program locator feature connects to Aptify.	Staff and Affiliates	SaaS