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# **REQUEST FOR PROPOSALS: Customer Relationship Management (CRM) Software**

**RELEASED: March 25, 2025**

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## Part A: General Information

### Introduction

16 YMCAs in the YMCA Alliance of Northern New England participate in a shared customer relationship management (CRM) contract, negotiated collectively to ensure consistent terms across all participating Ys. Each YMCA signs its own agreement. The current contract, signed in 2021, expires in August 2026.

The YMCA Alliance of Northern New England (the Alliance) is facilitating this process in partnership with a CRM Task Force, a group of experienced YMCA leaders that is representative of the YMCAs in the Alliance. This Task Force has been commissioned to oversee the RFP process and make a formal recommendation to the participating YMCAs on a CRM contract to commence no later than Summer 2026.

### Overview of the participating YMCAs in ME and NH

There are currently 16 YMCAs in Maine and New Hampshire that participate in the shared CRM contract. The YMCAs range in operating budget size from approximately \$1.5 million to \$7 million, with a total collective operating budget of \$62 million.

The participating YMCAs are listed below:

State	YMCA Name
ME	Auburn-Lewiston YMCA
ME	Bangor Region YMCA
ME	Bath Area Family YMCA
ME	Boothbay Region YMCA
ME	Central Lincoln County YMCA
ME	Down East Family YMCA
NH	Keene Family YMCA
ME	Kennebec Valley YMCA
ME	Mount Desert Island YMCA
ME	Old Town-Orono YMCA
ME	Penobscot Bay YMCA
ME	Sanford-Springvale YMCA
NH	Southern District YMCA
ME	Waldo County YMCA
ME	YMCA of Greater Waterville
ME	YMCA of Southern Maine

### Our Strategic Vision

To have a highly user-friendly software platform to support a variety of YMCA operational and programming areas. This platform will enhance our community's experience engaging with the YMCA, while supporting strong YMCA operations, capital improvement and growth.

### Scope of Work

We seek a CRM platform and/or suite of services that support the following: member management and engagement, including virtual membership experiences; registration for all programs; childcare and camping enrollment and management; donor engagement and fundraising; and financial management.

Specifically, our greatest needs include:

- Member engagement: Ease of use for members and front-line staff
- Donor engagement and fundraising integration, including communication tools
- Childcare and camp program management
- Financial management
- Ability to easily integrate with other platforms/tools
- Website and mobile application integration
- Reporting functionality, including customized reports
- Regular opportunities for training, including for front-line staff and system administrators
- Responsive and solutions-oriented customer service

## Part B: Request for Proposal Process

### Review & Selection Process

All proposals will be reviewed by the Alliance CRM Task Force. The Task Force will invite the top 2-3 candidates to interview and provide platform demonstrations. The Task Force will make a recommendation to the 16 participating YMCAs for final approval.

**PLEASE NOTE:** Effective as of the issuance date of this RFP, and continuing until a final vendor selection has been made, all communications pertaining to this RFP—including inquiries regarding the YMCAs' CRM needs for Summer 2026 and beyond, as well as any related discussions or negotiations—must be directed exclusively to Meg Helming, Chief Operating Officer of the Alliance. This communication protocol is intended to maintain the integrity, transparency, and fairness of the selection process. Local YMCA leadership has been instructed to refer any direct contact from prospective vendors back to the Alliance.

The YMCA reserves the right to reject any and all proposals.

### Pre-Submission Questions

Any questions regarding this request for proposal are to be made via email to Meg Helming, COO of the YMCA Alliance of Northern New England, at [meg.helming@nneymcas.org](mailto:meg.helming@nneymcas.org).

### Method and Date of Submission

RFP responses must be submitted by 5PM EST on Friday, April 25, 2025 via email to Meg Helming at [Meg.Helming@nneymcas.org](mailto:Meg.Helming@nneymcas.org).

### Key Dates:

- RFP issued: March 25, 2025
- RFP responses due: April 25, 2025
- Interviews/demos: May 19-23, 2025
- Task Force final recommendation presented by: July 1, 2025
- Final decision by: August 1, 2025

## Part C: Submission Requirements

Please include the following information in your written response.

- General company information
  - Include number of YMCAs (and budget size) currently utilizing the platform, as relevant
- Team organization
  - Include the bio of the anticipated account manager for this portfolio, as relevant

**The Y: We're for youth development, healthy living, and social responsibility.**

- Operational components and functionality, including the specifications below
- Fee and Contract Structure
  - Specify any products/services for which an add-on fee would be required, and specify that fee structure, as relevant
  - Specify any costs related to downloading or uploading data, documents, or reports, as relevant
  - Specify any payment processing fees, as relevant
- References: Three (3) current clients, preferably at least two of which are YMCAs, with similar-sized operations as the participating YMCAs in Northern New England

Please specifically address the following in your written response:

### **CONTRACT TERMS & PRICING**

- Total monthly fee, with clear explanation of what is included
- List of additional products and services that may be added, with related fee schedules
- Length of agreement; specify if different contract lengths impact fees
- Implementation cost, including conversion and training, as relevant
- Conversion timeline, as relevant

### **FEATURES**

- Membership management and engagement, including mass communications tools
  - Versatile membership types
  - Virtual membership options
  - Facility utilization (tracking who is in the building)
  - 24/7 facility access
  - 3rd party pay capabilities (Insurance-based memberships)
  - YMCA Nationwide Membership integration
  - Mobile application functionality
  - YMCA website integration
- Programming
  - Scheduling and roster management
  - Multi-site programming ability
  - Class/lap swim reservation system
- Childcare & camp program management
  - Financial aid tracking capabilities
  - Applications and health forms tracking capabilities
- Fundraising/development
  - Special events management
  - Donor tracking and engagement, including communications tools
- Operations & financial management
  - Ability to upload and store documents
  - Integrated and accurate invoicing system
  - Payment processing
  - Dashboards with key operating metrics
- Reporting
  - Standard and customization options
- Customer service
  - Description of customer service support, including guaranteed response time, and access (phone, live chat, etc.)
- Training
  - Include description of options (on-demand/pre-recorded, live, customized, etc.) and related recommendations and fees