



Consolidated Questions and RCAP Responses

CRM System Assessment and Strategic Planning Services

Repeated or substantially overlapping vendor questions have been consolidated into one complete question set.

A. Budget, Schedule, Contracting, and Administration

1. Budget range

Question: Has RCAP established an anticipated budget range or not-to-exceed amount for the assessment and strategic planning engagement?

RCAP Response:

The anticipated budget range is \$15,000 to \$30,000. Respondents will still be considered if the proposed amount falls outside this range.

2. Project start and completion window

Question: What award or start date, preferred project duration, target completion date, decision deadline, or other internal scheduling driver should respondents consider?

RCAP Response:

The anticipated start date would likely be November. Our preferred project duration would be between 5 to 8 weeks, but respondents will still be considered if the timeline falls outside this duration. There isn't a specific target completion date for this project, but it is preferred that it be completed prior to June 2027. We intend to select and notify respondents in October.

3. Payment and invoicing

Question: What standard contract terms, payment milestones, invoice requirements, payment methods, and payment schedules should respondents use in planning?

RCAP Response:

RCAP anticipates executing a standard professional services agreement with the selected consultant. Respondents may propose a fixed-fee engagement with reasonable milestone-based and/or deliverable-based invoicing. Final contract terms, invoicing requirements, payment methods, and payment schedules will be negotiated with the selected respondent during contract development. Vendors are encouraged to identify any preferred payment terms within their proposal.



4. Professional liability insurance

Question: What professional liability or professional indemnity policy type, minimum coverage limits, territorial or jurisdiction requirements, endorsements, and certificate wording are required? May coverage be provided by a qualifying non-U.S. insurer?

RCAP Response:

Specific professional liability or professional indemnity insurance requirements, including coverage limits, jurisdictional requirements, endorsements, certificate wording, and insurer eligibility, will be determined during contract negotiations with the selected respondent based on the final scope of work and associated risk profile. Respondents are encouraged to describe their existing professional liability coverage within their proposal.

5. Timing of insurance certificate

Question: At what point must the certificate of insurance be provided? Would submission after notice of intended selection but before contract execution satisfy the requirement?

RCAP Response:

Submission of a certificate of insurance after notice of intended selection, but before contract execution, would satisfy this requirement.

6. Question and proposal deadlines

Question: What exact cutoff time and time zone apply to the question deadline and the October 4, 2026 proposal deadline?

RCAP Response:

Responses submitted by October 4, 2026, at 11:59 PM EST will be accepted. Responses submitted after this deadline will not be considered.

7. Distribution of answers and amendments

Question: Will RCAP distribute or publicly post consolidated responses, amendments, and supplemental materials to all known prospective respondents?

RCAP Response:

Yes. Consolidated responses, amendments, and supplemental materials will be posted to the public solicitation listing. Known prospective respondents will also receive any pertinent updates directly.

8. Proposal receipt and amendment acknowledgment

Question: How should respondents confirm proposal receipt, and should proposals expressly acknowledge the U.S.-based-entity amendment?



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RCAP Response:

Proposal receipt confirmations will be provided upon request. Respondents are not required to expressly acknowledge the U.S.-based-entity amendment. Eligibility and compliance will be evaluated based on the information provided within the proposal.

9. Capability note

Question: Would RCAP find a short capability note useful before the full proposal submission?

RCAP Response:

No. Respondents should submit a complete proposal in accordance with the solicitation requirements.

B. Respondent Eligibility, Procurement, and Compliance

10. U.S.-based respondent eligibility

Question: How will RCAP apply the U.S.-based respondent requirement? Are U.S.-based sole proprietorships eligible?

RCAP Response:

Proposals will be considered only if the respondent can demonstrate: (1) legal authorization to conduct business and satisfy applicable U.S. tax requirements; (2) adequate physical and operational presence to successfully perform the work and provide ongoing support; and (3) compliance with all applicable security, privacy, and related requirements in the solicitation. RCAP reserves the right to determine whether a proposer has sufficiently demonstrated these qualifications.

11. Non-U.S. personnel and subcontractors

Question: May an eligible U.S.-based entity use affiliated teams, personnel, specialists, or subcontractors located outside the United States?

RCAP Response:

Yes. Eligible U.S.-based entities may utilize affiliated teams, personnel, specialists, or subcontractors located outside the United States, provided the respondent can demonstrate compliance with the eligibility, security, privacy, and operational requirements outlined in the solicitation. RCAP reserves the right to determine whether a proposer has sufficiently demonstrated these qualifications.

12. Remote one-person consultant

Question: Is RCAP open to a fully remote engagement delivered by a one-person consultant, assuming all requirements can be met?

**RCAP Response:**

Yes. RCAP is open to a fully remote engagement delivered by a one-person consultant, provided the respondent can demonstrate the qualifications, capacity, and experience necessary to successfully perform the work described in the solicitation. RCAP reserves the right to determine whether a proposer has sufficiently demonstrated these capabilities.

13. Federal funding and procurement restrictions

Question: Is this engagement, or a possible subsequent implementation, funded under a federal award or otherwise subject to 2 CFR Part 200 or other procurement restrictions?

RCAP Response:

The funding source for this engagement, and any potential subsequent implementation work, has not yet been finalized. As a result, respondents should assume that applicable federal requirements and procurement restrictions may apply. RCAP has structured this solicitation to support compliance with applicable funding and procurement requirements should they become necessary.

14. Follow-on procurement

Question: Does RCAP anticipate a separate procurement for modernization, replacement, integration, platform selection, requirements development, or implementation after the assessment?

RCAP Response:

Yes. Any follow-on work will depend on the assessment findings and subsequent leadership decisions.

15. Eligibility for follow-on work

Question: Would the consultant selected for this assessment be eligible to compete for follow-on work?

RCAP Response:

Yes, if qualified. Follow-on work will likely require a separate procurement process, and the consultant selected for this assessment may not ultimately be selected.

16. AI-assisted work, subcontractors, and data handling

Question: Are there restrictions, consent requirements, or disclosure requirements concerning AI-assisted tools, subcontractors, data handling, data location, privacy, accessibility, records retention, security frameworks, or project information?

RCAP Response:

Respondents should identify any anticipated use of subcontractors and describe any material considerations related to data handling, privacy, security, confidentiality, or AI-assisted tools that may be relevant to the proposed approach. RCAP reserves the right to establish additional requirements during contract negotiations based on the



final scope of work and associated risks.

17. Comparable experience

Question: How will comparable experience be evaluated, including transferable organizational, technology-ecosystem, governance, modernization, or current-state assessment work outside the nonprofit or CRM sector?

RCAP Response:

Comparable experience will be evaluated based on the relevance, scope, complexity, and applicability of the work to RCAP's objectives. RCAP may consider experience from outside the nonprofit or CRM sectors when the methodologies, assessment approach, and resulting recommendations demonstrate meaningful relevance to the engagement.

18. Prior individual experience

Question: May a newer firm cite comparable work performed by proposed personnel through prior employment or consulting engagements if clearly identified as the individual's experience?

RCAP Response:

Yes. RCAP will consider comparable work performed by proposed personnel through prior employment, consulting engagements, or other relevant professional experience, provided the experience is clearly identified and the individual's role in the engagement is described.

19. Vendor neutrality

Question: How should firms with platform-specific partnerships or experience demonstrate vendor neutrality, and will their recommendations still be considered vendor-neutral?

RCAP Response:

RCAP recognizes that respondents may have platform-specific partnerships, certifications, or implementation experience. Such experience will not automatically disqualify a respondent or be viewed as evidence of bias. Respondents should describe how they will maintain an objective, evidence-based assessment process and develop recommendations that are aligned with RCAP's needs and assessment findings. Recommendations will be evaluated based on their rationale, relevance, and demonstrated alignment with the engagement objectives.

C. Engagement Scope and Assessment Depth

20. Overall assessment depth

Question: Is the engagement primarily a strategic technology and business-process assessment based on documentation, demonstrations, stakeholder discovery, and functional/nonfunctional requirements, or

should it include hands-on technical review?

RCAP Response:

The engagement is intended as a strategic technology and business-process assessment informed by stakeholder discovery, available documentation, system demonstrations, and functional and nonfunctional requirements analysis. Respondents may incorporate an appropriate level of technical review to support their assessment and recommendations; however, RCAP is not seeking a formal source-code audit, penetration test, or similarly intensive technical review as part of the base scope.

21. Hands-on technical review

Question: Should the selected consultant review source code, SQL queries, database architecture or schema, system configurations, integrations, infrastructure, logs, security configurations, permissions, audit logging, and performance where access is available?

RCAP Response:

No. RCAP does not anticipate that the selected consultant will be required to perform a comprehensive review of source code, SQL queries, database schemas, system configurations, infrastructure, logs, security configurations, permissions, audit logging, or similar technical artifacts as part of the base scope. Limited technical documentation, demonstrations, and technical discussions may be made available where appropriate to support the assessment and resulting recommendations.

22. Formal cybersecurity testing

Question: Should respondents include penetration testing, vulnerability scanning, security control testing, or other formal cybersecurity testing, or should security be assessed at a strategic, architectural, governance, permissions, auditability, resiliency, and risk level?

RCAP Response:

Security should be assessed at a strategic, architectural, governance, permissions, auditability, resiliency, and risk-management level. Respondents should not include penetration testing, vulnerability scanning, security control testing, or other formal cybersecurity testing within the base scope of the engagement.

23. Data analysis scope

Question: Should the assessment include data quality, migration feasibility, historical data, growth expectations, and record-retention requirements?

RCAP Response:

Yes. RCAP anticipates that the assessment will consider data quality, migration feasibility, historical data considerations, anticipated growth and scalability requirements, and applicable record-retention considerations to the extent they are relevant to evaluating future-state options and developing recommendations.



24. Related technology ecosystem

Question: Is the assessment limited to DCS and Unanet, or should it include adjacent systems, applications, databases, spreadsheets, portals, fundraising or marketing platforms, grants systems, program-specific tools, data warehouses, data lakes, reporting repositories, and other data flows?

RCAP Response:

The assessment is primarily focused on DCS. Respondents should consider related systems, integrations, and data flows only to the extent necessary to understand the current-state operation of DCS and evaluate future-state options. While Unanet and other connected systems may be relevant to the assessment, RCAP is not seeking a comprehensive review of its broader technology ecosystem as part of the base scope.

25. Unanet integration scope

Question: Should the assessment evaluate specific DCS-to-Unanet interfaces, APIs, exports, and technical integration approaches, or primarily identify business and technical integration requirements at a strategic level?

RCAP Response:

The assessment should primarily identify business and technical integration requirements at a strategic level as they relate to DCS and potential future-state options. Consideration of existing interfaces, APIs, exports, and integration approaches is appropriate where relevant; however, RCAP is not seeking a detailed technical integration design, implementation plan, or API-level assessment as part of the base scope.

26. Unanet environment and objectives

Question: Which Unanet product and environment does RCAP use, what data should be integrated, and does RCAP envision one-way or bidirectional exchange?

RCAP Response:

RCAP currently utilizes Unanet GovCon. The purpose of this assessment is not to design a specific DCS-to-Unanet integration. Rather, respondents should identify and evaluate business and technical integration requirements that may inform future-state recommendations. Where appropriate, respondents may discuss potential integration approaches and relevant data exchanges that could support RCAP's operational objectives.

27. Keep-and-improve option

Question: Is RCAP genuinely open to a keep-and-improve recommendation for DCS, or is there an existing preference toward replacement?

RCAP Response:

Yes. RCAP is genuinely open to a keep-and-improve recommendation for DCS if supported by the assessment findings. RCAP has not predetermined that replacement is the preferred outcome of this engagement.



28. Platform-specific evaluation

Question: Should the consultant identify and compare specific commercial CRM or enterprise platforms and vendors, such as Microsoft Dynamics 365 or Salesforce, or remain platform-agnostic?

RCAP Response:

The primary purpose of this engagement is not vendor or platform selection. Respondents should remain focused on assessing DCS, identifying requirements, evaluating current-state challenges, and developing strategic recommendations. However, where appropriate, respondents may identify commercial CRM, enterprise, or platform solutions that appear well-aligned with RCAP's needs and objectives. Additional platform-specific evaluations, implementation planning, vendor-selection support, or other value-added services may be identified separately as optional services outside the base scope of the engagement.

29. Platform comparison detail

Question: If specific platforms are evaluated, should the final assessment compare capabilities, advantages and disadvantages, implementation considerations, licensing, and estimated costs?

RCAP Response:

If specific platforms are evaluated as part of the assessment findings, RCAP would find value in understanding their capabilities, advantages, disadvantages, implementation considerations, licensing implications, and high-level cost considerations. However, detailed product evaluations, vendor comparisons, implementation planning, and vendor-selection activities are not required as part of the base scope of this engagement and may be identified separately as optional value-added services.

D. Current DCS Environment and Available Information

30. DCS technology stack and architecture

Question: What application framework, programming languages, database technologies, hosting environment, infrastructure model, reporting tools, major components, and third-party technologies currently comprise DCS?

RCAP Response:

DCS is a custom-built application utilizing legacy ASP.NET technologies and Telerik components and is hosted within AWS. Additional information regarding the application architecture, technology stack, data structures, integrations, and supporting infrastructure will be made available to the selected consultant during the assessment process as appropriate.

31. System age and modernization history

Question: When was DCS originally developed, what significant modernization or architectural updates have occurred, and which components are aging, unsupported, or approaching end of life?

**RCAP Response:**

The current iteration of DCS was deployed beginning in approximately 2015-2016 following migration from an earlier system. DCS is a custom-built application utilizing legacy ASP.NET technologies and Telerik components and is hosted within AWS. One objective of this assessment is to better understand the current architecture, modernization history, technical risks, and long-term sustainability of the platform. Additional technical information will be made available to the selected consultant during the assessment process as appropriate.

32. Hosting and infrastructure constraints

Question: Where is DCS hosted, is the infrastructure cloud, on-premises, or hybrid, and what hosting or infrastructure constraints should inform modernization options?

RCAP Response:

DCS is hosted within AWS and operates in a cloud-based environment. RCAP does not have a requirement to migrate away from AWS as part of this assessment and is open to recommendations that leverage the existing hosting environment where appropriate. Respondents should identify any hosting, infrastructure, resiliency, supportability, or operational considerations that may influence future-state recommendations.

33. Source-code ownership and availability

Question: Who owns the DCS source code, will source code or a structured code walkthrough be available, and what level of source-code review does RCAP expect?

RCAP Response:

DCS is a custom-built application. RCAP anticipates that the selected consultant will have access to technical discussions, demonstrations, documentation, and other relevant information as appropriate during the assessment process. Structured walkthroughs of system components may be available where necessary to support the assessment. RCAP does not anticipate that a comprehensive source-code review will be a primary requirement of the engagement.

34. Maintenance and support model

Question: Who currently maintains, supports, develops, or enhances DCS: RCAP staff, an incumbent vendor or consultant, or both? Will those resources participate in discovery?

RCAP Response:

DCS is maintained, supported, developed, and enhanced by internal RCAP staff. RCAP anticipates that appropriate technical and operational staff will participate in discovery activities and be available to support the assessment process.

35. Available documentation and evidence

Question: What architecture diagrams, data models, schemas, data dictionaries, integration documentation,

system inventories, permissions documentation, operational procedures, issue inventories, reporting inventories, logs, configurations, repositories, infrastructure documentation, prior studies, audits, roadmaps, and security or disaster-recovery assessments will be available?

RCAP Response:

Documentation and technical artifacts currently available vary by subject area. The selected consultant will be provided with access to relevant documentation, system information, technical discussions, demonstrations, and other materials reasonably available to RCAP that support the assessment. The purpose of this engagement is, in part, to identify documentation gaps, improve understanding of the current environment, and develop recommendations based on the information available. Additional materials may be provided as they are identified during the discovery process.

36. System access

Question: Will the selected consultant receive read-only access to DCS, Unanet, a test environment, representative reports and SQL queries, configurations, logs, or controlled demonstrations? What access will technical administrators provide?

RCAP Response:

Access requirements will be determined during project initiation and may vary based on the needs of the assessment and applicable security considerations. RCAP anticipates that the selected consultant will have access to relevant documentation, demonstrations, technical discussions, and other information necessary to support the engagement. A testing environment may be available for certain assessment activities where appropriate; however, specific system access levels and technical artifacts will be evaluated during the discovery process.

37. DCS instances and regional variation

Question: Do the six regional organizations use one shared DCS instance or separate configurations, and do they run largely shared processes or distinct regional workflows?

RCAP Response:

DCS operates as a shared platform across RCAP and the regional organizations. Regional users are generally limited to information associated with their respective organizations and areas of responsibility. While many core processes and workflows are shared across the network, particularly for national programs and reporting activities, regional organizations also maintain distinct workflows, operational practices, and business requirements that should be considered as part of the assessment.

38. Current pain points

Question: What are the primary usability, workflow, reporting, integration, performance, maintenance, permissions, auditability, resiliency, and other business challenges experienced with DCS?

RCAP Response:



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The primary objective of this engagement is to evaluate the long-term resiliency, sustainability, and supportability of DCS. RCAP has also identified potential considerations related to usability, workflows, reporting, integrations, maintainability, documentation, and future-state modernization opportunities. The core purpose of the assessment is to validate, further define, and prioritize these considerations through stakeholder discovery, review of the current environment, and independent analysis. Respondents should not assume that RCAP has predetermined conclusions regarding the future of DCS.

39. Data volume and complexity

Question: What major data domains, database size, historical volume, growth expectations, and other measures of data complexity should the consultant consider?

RCAP Response:

RCAP cannot fully answer this question at this time. Relevant information regarding data domains, historical records, data volumes, growth patterns, and related technical considerations will be made available to the selected consultant as appropriate during the assessment process. Respondents should assume these factors are relevant to the assessment and future-state recommendations.

40. Reporting environment

Question: Which reports or reporting obligations are hardest to support, what reporting and dashboard capabilities exist, and approximately how many reports, dashboards, queries, or recurring processes depend on DCS?

RCAP Response:

Reporting is a significant function of DCS, and a substantial portion of RCAP's operational and programmatic reporting depends upon the platform. Many reports are generated directly through reporting capabilities within DCS, while others rely on SQL queries and related reporting processes. RCAP cannot fully quantify the number of reports, dashboards, queries, or recurring reporting processes at this time; however, reporting requirements, reporting dependencies, and future-state reporting capabilities are important considerations for this assessment.

41. Other systems inventory

Question: What systems, applications, databases, spreadsheets, portals, or tools are used alongside or outside DCS for program and operational data?

RCAP Response:

DCS serves as the primary system of record for a substantial portion of RCAP's operational, programmatic, and reporting activities. In addition to DCS, RCAP utilizes Unanet GovCon for financial and expense management functions and maintains a variety of spreadsheets and related tools that support operational and programmatic activities.



E. Stakeholder Discovery and Delivery Approach

42. Stakeholder groups

Question: Approximately how many stakeholder groups, functional areas, interviewees, or workshop participants should respondents plan for across RCAP National and the six regional partners?

RCAP Response:

Respondents should plan for participation from the Programs Team, Reporting Team, Training and Events/Communications, Finance Team, RCAP DCS Workgroup members representing the regions, and leadership. Separate stakeholder groups from each of the six regional partners are not anticipated as part of the base scope. Regional perspectives and requirements will be represented through the DCS Workgroup and other designated participants.

43. Regional participation format

Question: Should discovery include a separate session with each regional organization, combined regional workshops, or a smaller representative subset? Must each region participate separately?

RCAP Response:

No. Separate sessions with each regional organization are not anticipated as part of the base scope of this engagement. Regional perspectives will be represented through designated participants.

44. Discovery coordination

Question: Will RCAP coordinate discovery scheduling and identify participants, including regional representatives and other required stakeholder groups?

RCAP Response:

Yes. RCAP anticipates coordinating discovery scheduling and identifying the appropriate participants, stakeholder groups, and subject matter experts needed to support the assessment.

45. Functional organization information

Question: Will RCAP provide a high-level functional organizational chart, staffing or FTE information by function, or other organizational context to support discovery planning?

RCAP Response:

Yes. Relevant organizational and stakeholder information will be provided as needed to support the assessment.

46. Remote versus onsite delivery

Question: May kickoff, discovery, validation, assessment work, and the final presentation be completed fully



remotely, or should respondents anticipate onsite meetings or travel?

RCAP Response:

Yes. RCAP anticipates that the engagement can be completed fully remotely and does not currently anticipate requiring onsite meetings or travel.

47. Travel logistics

Question: If onsite participation is expected, where would it occur and would travel expenses be reimbursed separately?

RCAP Response:

RCAP does not currently anticipate requiring onsite participation. If onsite activities are proposed and mutually agreed upon, any associated travel assumptions should be clearly identified within the proposal.

F. Deliverables, Governance, and Outcomes

48. Final deliverable scope

Question: Should the final System Summary provide only a recommended strategic direction, or also a future-state architecture, data-flow view, technical appendices, risk register, scored options matrix, phased roadmap, decision criteria, dependencies, sequencing, staffing needs, implementation timelines, licensing considerations, and rough-order-of-magnitude costs?

RCAP Response:

The final System Summary should include a recommended strategic direction supported by appropriate analysis and rationale. RCAP would also find value in future-state considerations, key risks, dependencies, implementation considerations, and a high-level roadmap where relevant. The level of detail and supporting materials is left to the respondent's professional judgment and proposed approach.

49. Executive summary versus technical detail

Question: How much technical detail should be included in the final System Summary, and should it remain a concise executive document with supporting appendices?

RCAP Response:

The final System Summary should remain concise and appropriate for executive review. Supporting appendices may be used to provide additional technical details where appropriate.

50. Primary outcome

Question: What is RCAP's single most important desired outcome: a board-ready recommendation, build-

versus-buy comparison, prioritized roadmap, implementation foundation, or another result?

RCAP Response:

RCAP's most important, desired outcome is a leadership-ready recommendation supported by a prioritized roadmap for improving long-term resiliency, sustainability, and supportability of DCS. While respondents may include additional analysis, comparisons, or implementation considerations, RCAP is primarily seeking a clear and actionable path forward based on the assessment findings.

51. Deliverable audience

Question: Will findings be reviewed only by the core project team, or also by executive leadership, the CEO, the Board, regional leadership, or other stakeholders?

RCAP Response:

Findings will be reviewed by the core project team, executive leadership, and the CEO. RCAP may also share findings with the Board, regional leadership, and other stakeholders as appropriate.

52. Core project team and sponsor

Question: Who will make up the core project team, and who will serve as executive sponsor or ultimate decision-maker?

RCAP Response:

The core project team will include the DCS Developer and Data & IT Manager. The ultimate decision-maker is the CEO.

53. Prior modernization work

Question: Has RCAP completed prior DCS assessments, modernization studies, requirements gathering, user surveys, platform evaluations, audits, or roadmaps that will be available to the selected consultant?

RCAP Response:

Yes. RCAP has conducted stakeholder feedback activities and other planning efforts that may be relevant to the assessment. Relevant materials will be made available to the selected consultant as appropriate during the assessment process.