



**Request for Interest  
Knack Data Management Tool Expansion Pilot  
December 19, 2019**

PACDC is working with North 4<sup>th</sup> LLC to expand a data management tool currently being used by one Philadelphia area community development corporation to up to three more PACDC member organizations. We are seeking Requests for Interest from PACDC members in good standing to participate in this expanded pilot program. **Responses to this RFI are due by 5pm on January 16<sup>th</sup>** and should be sent to Beth McConnell at [bmccconnell@pacdc.org](mailto:bmccconnell@pacdc.org)

**Who is eligible:** PACDC members in good standing that have at least one full-time staff person devoted to managing a commercial corridor or business district. To verify that your membership is current, contact Suzanne Sheeder at [ssheeder@pacdc.org](mailto:ssheeder@pacdc.org)

**About the Knack data management tool:** This data management tool can be used to track a variety of information on corridor activities to streamline operations, make contract and grant reporting easier, better share knowledge among staff, identify trends and challenges, and manage contacts and projects. Knack is an off-the-shelf program that is highly customizable, and is now in use with the North 5<sup>th</sup> Street Revitalization Project through a partnership with North 4<sup>th</sup> LLC. PACDC believes the success the team has experienced so far with the Knack tool could benefit more corridor managing organizations. With the support of JPMorgan Chase and the Philadelphia Department of Commerce, PACDC is launching this pilot program with three organizations. If this pilot is a success, we may seek to expand it to more organizations in the future pending the availability of funding.

**Learn more and ask questions:** PACDC and North 4<sup>th</sup> LLC will host a webinar **tentatively scheduled for Monday, January 6<sup>th</sup> from 2:30 pm – 3:30 pm** to demonstrate the Knack data tool and answer questions about this RFI. Applicants are strongly encouraged to participate. Please RSVP for that webinar to Beth McConnell at [bmccconnell@pacdc.org](mailto:bmccconnell@pacdc.org) and log-in/telephone dial-in information will be provided, along with a confirmation of the date and time.

**What you will receive:** PACDC will pay the costs associated with retaining North 4<sup>th</sup> LLC to implement the Knack data management tool to support corridor management operations. North 4<sup>th</sup> will:

- Customize the data tool, app functionality, and page views for each corridor team;
- Work with selected CDC staff to ensure all data is uploaded into the database for each corridor team;
- Set up Commerce contract reporting for each corridor team (if relevant);

- Co-design/facilitate cohort meetings and trainings of the three selected groups to ensure teams are getting the most impact out of new systems and process improvements;
- Provide each corridor team with a user guide/manual and checklist to ensure smooth transition and increased efficiencies.

PACDC will also pay subscription fees for the data tool for one year, and has some limited resources to help purchase tablets or devices for data entry if needed.

**What you are obligated to do:**

- Delegate one staff member as point of contact for the project;
- Allocate necessary staff time to meet with PACDC and North 4<sup>th</sup> LLC to customize the tool and plan the project timeline;
- Provide data sets for migration into the data tool;
- Commit to use the tool as part of regular operations for at least one year. Organizations that are interested in maintaining the tool after the first year are responsible for ongoing subscription fees in future years.<sup>1</sup>
- Ensure that staff who must use the Knack tool have access to the necessary devices (see below).

**Devices you need:** Any office computer, smartphone, or tablet can run the Knack tool. Staff that are in the field and who are expected to input data in real time will need devices with data plans to connect to the Internet. Organizations should consider if their staff are able to use their personal phones or tablets, or if they need to purchase devices for data input that must be done in the field, and how to cover the cost of data plans. PACDC has a limited budget that can help purchase hand-held devices, but cannot subsidize the cost of monthly data plans.

**What we're looking for from responses to this RFI:** PACDC is interested in exploring how the Knack tool can improve challenging data management environments, so we encourage corridor managing organizations to apply even if they don't feel confident in their current data management systems or processes. Groups that regularly participate in PACDC's Commercial Corridor Working Group are especially encouraged to apply. Organizations that do not have full-time staff engaged in corridor management are discouraged from applying.

**Timeline:** Responses to this RFI are due to PACDC by 5pm on January 16<sup>th</sup> 2020. We anticipate groups will be selected and notified by January 24<sup>th</sup>, 2020. Contracts will be sent to selected groups by January 31<sup>st</sup> 2020, and are due back signed by February 14<sup>th</sup>. The work with North 4<sup>th</sup> LLC to set up the tool, train staff, etc. will begin on or near March 2<sup>nd</sup> and continue for six months through August 2020, after which the participating groups will have another six months through the end of February 2021 to work with the Knack tool and decide if they wish to continue its use as part of regular operations.

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<sup>1</sup> Subscription fees vary based on the number of groups participating and the volume of data being tracked, but are likely to be \$200 to \$450 per year, per organization.

*Please limit responses to within the space provided*

**Organization**

**Your Name and Title**

**Phone**

**Email**

**Who is on your corridor team?** List corridor managers, corridor cleaners, BID staff, other economic development staff that interact with the corridor or supervise corridor staff, and how long each has been in their current role.

Who would be the **main point person** for this project? Does this person have **capacity to spend significant time** with our consultant to set up, customize, and test a system that works for your team? (Estimate 3 hours/week over the next 6 months, with some weeks requiring additional time and some weeks not requiring any time).

**What are the current roles related to reporting and/or tracking work** (for funders or for internal purposes)? Who does what?

**How do you currently track data** - do you use a Customer Relationship Management (CRM) system or other data management software? If so, which one are you using? Please indicate whether and how you are maintaining lists of businesses, association membership, properties, vacancies, contacts, and any other relevant data. *(Ex: Contacts stored in Mailchimp & several Word docs; Businesses stored in a shared Google spreadsheet and listed on our Wordpress website; Properties stored in several Excel spreadsheets;)*

What are the **most challenging aspects** of tracking, organizing, or reporting on your corridor data currently, for your team?

**Why are you thinking about adopting Knack** (or why do you want to participate in this project)? What benefits you hope a tool like Knack will offer to support your work?

**Do you need financial assistance to purchase hand held devices** for staff that are in the field?  
If so, for how many staff?

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Signature of Executive Director

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Date