



CRM Solutions Architect & Implementation Partner

Request for Qualifications | June 2026

****NOTE: We are unable to respond to questions from July 2nd to July 17th due to our office mid-year closure. Applications are due Thursday, July 23, 2026 by 11:59PM Pacific Time.**

Background

Magic Cabinet is a private foundation dedicated to shifting philanthropy by centering community. To align our operational backbone with this mission, we are in a critical shift to bring relationship data across various platforms into a unified Customer Relationship Management (CRM) system. The goal is to ensure that relationship coordination - among grantees, funder partner clients, community members, and more - serves as the engine for data-driven strategy.

This work, informed by a robust 3-month discovery assessment from Q4 of 2025, requires an intentional, multi-workstream approach to codify new data practices and build connective tissue. We prioritize partners whose approach reflects the communities this work serves.

Project Overview

We are looking for a CRM Solutions Architect & Implementation Partner to intentionally establish a unified CRM architecture and robust data practices that adhere to Magic Cabinet's jobs-to-be-done (JTBDs) and data sovereignty framework.*

This consulting engagement is distinguished by two sequential phases:

- 1) Through December 2026 - Consultant leads requirements validation, data audit and inventory, software vetting and selection, data architecture & preparation, and initiating data migration.
- 2) In 2027 - Consultant continues and completes data migration, conducts testing and validation, launches system to go-live, in addition to leading post-launch onboarding, standard operating procedure refinement, and workflow maturation into 2027.

Activities

- Align and collaborate via sync meetings with Magic Cabinet contacts.
- Drive technical execution across these interconnected streams of work:
 - Align strategy and architecture with discovery and data governance frameworks.
 - Lead data architecture and auditing, including system inventory, user wishlist, and alignment with CRM deployment.
 - Guide purchasing by providing technical vetting of CRM options against a weighted scoring rubric, ensuring user friendliness, low technical debt, and socially responsible practices.
 - Execute technical configuration and deployment, including back-end setup, API integrations, and final data migration to the production environment.
 - Advise with frameworks to enable MC staff to co-design role-based SOPs with explicit attention to adoption barriers, not just documentation and with the goal to minimize manual work and ensure data reliability.
 - Develop a high-level adoption and change management framework to support onboarding and staff uptake.
- Providing regular progress updates to the project team, and as needed to all-staff.

Deliverables

Final deliverables that will enable full CRM implementation must include, at a minimum:

- *Final Data Architecture & ERD* - a scalable data architecture and Entity Relationship Diagram (ERD), mapped directly to user JTBDs. This will be derived from a comprehensive data inventory, including existing data and a future “wishlist.”
- *Technical Vetting and Evaluation Report* of the chosen CRM software options against the weighted scoring rubric, confirming data sovereignty integration, user friendliness, low technical debt, and alignment with socially responsible practices.
- *Technical Configuration & Deployment Documentation*, including back-end setup, API integrations, and successful transfer from any “legacy systems or places of storage” to the CRM environment.
- *Draft role-based SOPs for key user groups at the foundation.*
- *Habituation Plan* designed to ensure high staff uptake and that the CRM becomes a routine habit across phases of time.

Milestones

- Completion of data auditing and technical documentation for architecture
- Integration of "Sovereignty Guardrails" into the final CRM technical architecture
- Finalizing the CRM selection and implementation
- The CRM goes “live” for end-users org wide in the first half of 2027, with learner onboarding as a fast-follow to launch.
- Deliverables for SOPs development are complete

Compensation

Magic Cabinet has allocated up to \$250,000 in funding for this project. This amount will cover all deliverables of the project, including data auditing and technical documentation, vetting and evaluation of CRM software, costs of CRM acquisition and licensing for 2026, technical configuration of the CRM software, deployment documentation and staff onboarding, and all other associated documentation.

Magic Cabinet welcomes proposals that accurately reflect the scope, level of expertise, approach, timeline, and resources required to successfully complete the work. Respondents should submit a proposal with a detailed budget accompanied by clear descriptions and rationale for proposed costs, deliverables, and timeline.

Cost will be evaluated alongside experience, approach, overall value, and alignment with Magic Cabinet’s mission. Magic Cabinet reserves the right to negotiate scope, budget, deliverables, and contract terms with the selected vendor to ensure mutual alignment.

Project Timeline

The ideal start date is September 1, 2026 but we welcome proposals that outline a feasible timeline to achieve Phase 1 activities. While we offer flexibility around the start date, please clearly articulate how your project plan will ensure we hit this firm year-end data migration deadline.

Ideal Candidates

We are seeking a consultant or consulting firm with a proven capacity for intentional CRM projects such as this. The ideal candidate will possess:

- 5+ years of experience in applied CRM technical architecture and system implementation for government, non-profit, or foundation environments.
- Demonstrated expertise in human-centered design concepts and user research.
- A software-agnostic approach with the ability to objectively evaluate and implement various platforms based on JTBDs and organizational needs.
- Deep understanding of system migration complexities and the governance required for high data-privacy and data sovereignty constraints.
- Strong change management and project management skills focused on habituation and long-term staff uptake.
- Proven experience managing sub-contractors/vendors to deliver cohesive project outcomes.
- Demonstrated experience working with or within communities that are underrepresented in philanthropy, including organizations led by and accountable to communities of color, immigrant communities, or low-income communities. This includes understanding the data privacy concerns, trust dynamics, and power considerations specific to these contexts.

Application Requirements

- ☐ Cover Letter or Letter of Interest (1-2 pages maximum), addressing:
 - Experience with nonprofits, foundations, or small mission-driven organizations
 - Availability and ability to support a 2027 go-live
 - Your team's lived or professional experience navigating data trust and privacy concerns with communities that have reason to be skeptical of data collection, and how that informs your approach to data sovereignty and system design
- ☐ Resume or Team Bios
- ☐ 1-2 Relevant Project Examples (2 pages max per example)
- ☐ High-Level Description of Proposed Approach (3 pages max), that should address the deliverables, evaluation and solution selection methodology, and a high-level timeline
- ☐ Budget proposal with estimated cost range, brief rationale, and key assumptions

** Our organization has already developed JTBD documentation, a preliminary data governance framework, and sovereignty guardrails, and a weighted CRM system evaluation rubric is underway. These materials will be provided to the selected consultant to accelerate implementation. We ask respondents to focus on requirements validation, architecture, solution selection, implementation, and deployment.*

Submission Deadline

Applications are due Thursday, July 23, 2026 by 11:59PM Pacific Time. Please send application materials and any questions** to both points of contact for this project:

- Drew Tocco, Operations Manager | drew@magiccabinet.org
- Vora Savengseuksa, Sr. Service Designer | vora@magiccabinet.org

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