



# CHESAPEAKE BAY FOUNDATION

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*Saving a National Treasure*

Salesforce Migration Luminate CRM to Non-Profit Success Pack

Implementation Partner Selection

Request for Proposal

May 3, 2021

Due Date and Time

June 9, 2021 at 5:00 pm EST

## 1 Introduction

The Chesapeake Bay Foundation (CBF) is requesting Offers from qualified firms for the migration of their Luminare CRM (LCRM) Salesforce managed package CRM to Salesforce Non-Profit Success Pack (NPSP), an enterprise implementation initiative to move CBF off of LCRM because it has reached end of life while staying on the Salesforce platform. Secondary goals are to simplify business process in order to facilitate the mission of the organization, achieve operational efficiencies, and allow the CBF to build a sustainable business model.

The intent of this Request for Proposal (RFP) is to select an implementation partner and related implementation services that address all the needs described within this RFP. In general, the enterprise software implementation scope includes Constituent Relationship Management (CRM), fundraising, volunteer management, and program management.

The successful Offeror(s) will be expected to work closely with the CBF's designated Project Management Team to administer an effective and efficient program to successfully implement a complete solution. The CBF will contract with one prime contracting firm for all implementation services.

### 1.1 Intent to Bid

Please provide an email response of your intent to bid on this RFP. Providing this information to CBF will allow you to be copied on all updates to the RFP process including vendor submitted questions, and CBF responses.

Within your email, please provide the following information by 05/12/2021.

To: Jsands@cbf.org

Email Subject Line: NPSP Software Implementation Intent to Bid

Body of Email:

Company Name

Contact Name

Phone

Email

### 1.2 RFP Due Date

Offers shall be received via Box file upload on June 9th, 2021 by 5:00 PM ET Please use the link below to upload all proposals and supporting documents.

### [CBF Implementation Partner RFP Responses](#)

### 1.3 Response to Questions

Please submit questions in an email to Jacqui Sands at [jsands@cbf.org](mailto:jsands@cbf.org). Any and all questions regarding this RFP shall be directed to Jacqui Sands, no other office or individual at the CBF. Informal questions may be answered orally. The CBF makes no warranty of any kind as to the

correctness of any oral answers and uses this process solely to quickly provide minor clarifications. Oral statements or instructions shall not constitute an addendum to this RFP. Offeror shall not be entitled to rely on any verbal response from the CBF. Formal questions regarding any part of this RFP that may result in material changes will result in a formal addendum to the RFP.

All questions should be submitted by June 2nd, 2021 to ensure a response from CBF.

#### 1.4 Selected Vendor Meetings

The CBF may request a meeting with potential partners to further investigate if the partner organization is a good fit for the CBF. Meetings can be conducted virtually and the CBF will attempt to limit them to 1 meeting of 1-2 hours in duration.

It will be the responsibility of the bidding organization to organize and/or prepare for the required meetings.

#### 1.5 Final Contract Negotiations and Notification of Award

This RFP is part of a competitive negotiation process intended to allow the CBF to obtain services as outlined herein in a manner that is most advantageous to the CBF. This RFP provides the CBF the flexibility to negotiate with Offerors, if desired, to arrive at a mutually agreeable relationship. Price may weigh heavily in the evaluation process but will not be the only factor under consideration and may not be the determining factor.

#### 1.6 Intent

It is the CBF's intent to select a single offer, which are most favorable in all respects, including scope, availability of services, quality of services, reputation, and price.

#### 1.7 Authority

This document was developed by the CBF Project Management Team with guidance from the Vice President of Administration and the Executive Management Team of the organization.

This document has been prepared for use by internal organization audiences as well as industry suppliers. It should not be provided to external bodies without the express written or verbal consent of the Vice President of Administration.

The CBF will not reimburse any information or administrative costs incurred as a result of participation in response to the RFP. All costs associated with response will solely reside at the responding party's expense.

#### 1.8 Confidentiality

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to the CBF's enterprise software implementation effort, may be disclosed to another party, or used for any other purpose without the express written or verbal consent of the CBF.

#### 1.9 Audience

The intended audience for this document is Salesforce.org Certified Implementation Partners with expertise in migrating non-profits to Salesforce's NPSP product. The CBF is especially interested in companies with experience migrating non-profits from LCRM to NPSP.

### 1.9.1 Minority Participation

CBF actively encourages proposals from Small, Women and Minority Owned (SWAM) Businesses. Please note if you are a Small, Women or Minority Owned Business and if you are certified by the State/Commonwealth/DC.

### 1.9.2 Minimum Requirements

At a minimum, you must be able to provide the following and have the following qualifications.

- Must be able to provide a Certificate of Insurance including General Liability, Auto and Workers Compensation.
- Be a current Salesforce certified North American nonprofit consulting partner.

## 2 CBF Organizational

### 2.1 About the CBF

Founded in 1967, the Chesapeake Bay Foundation (CBF) is the largest independent conservation organization dedicated solely to saving the Bay. Serving as a watchdog, we fight for effective, science-based solutions to the pollution degrading the Chesapeake Bay and its rivers and streams. With offices in Maryland, Virginia, Pennsylvania and the District of Columbia and 15 field centers, CBF leads the way in restoring the Bay and its rivers and streams.

### 2.2 Project Background and Current Environment

The CBF is consistently recognized as a premier organization dedicated to saving the Chesapeake Bay, a National Treasure. In order to continue to Save the Bay, and due to the end of life of Blackbaud's Luminare CRM, the CBF has determined the best path forward is to continue to leverage their investment in the Salesforce platform and migrate to the relevant software that is part of Salesforce.org's Nonprofit Cloud.

To address the current situation, The CBF is requesting offers from qualified firms for their enterprise Salesforce implementation initiative to migrate from LCRM to NPSP (and related additional managed packages) in order to facilitate the mission of the organization, achieve operational efficiencies, and allow the CBF to build a sustainable business model.

The following table lists the core or key applications that are currently being used by CBF as part of LCRM as well as the proposed replacement. The CBF is open to suggestions from vendors on some of the secondary applications but moving off of the Salesforce platform or not utilizing NPSP is not up for review or discussion. Other tools are being utilized with CBF and will be provided as needed.

Current	Proposed
Luminare CRM Managed Package-Core Fundraising	Non-Profit Success Pack
Luminare CRM Managed Package-Volunteers	Volunteers for Salesforce
EPR Program Management Modules (custom)	EPR Program Management Modules (custom)-move as is
Conga	TBD
Roll Up Helper	Roll Up Helper

Case Management (Sales Cloud)	Case Management (Sales Cloud)
Appinium Learn Trac	Appinium Learn Trac
Linvio Event Management	Linvio Event Management
Luminate CRM Managed Package-Events	TBD
Box	Box
Luminate Online Integration	Omatic Cloud
Apsona	Apsona
DMI (direct marketing)	DMI
Cloud 4J	Cloud 4J
Custom Accounting Sub-Ledger	SF Accounting Sub-Ledger or Intacct CRM Integration

The following lists key operating statistics for Luminate CRM

- Size of database: 39.7 GB
- Number of Contacts: 1, 389,350
- Number of Accounts: 1,184,350
- Number of Opportunities: 2,820,024

Please refer to Excel Workbook **CBF Current LCRM Setup** for additional details on the current environment.

### 3 Statement of Need

#### 3.1 Statement of Need

The fundamental goal of this project is to successfully migrate The CBF to Salesforce’s NPSP from Luminate CRM while minimizing impact to daily business operations both during the implementation and at go live.

#### 3.2 Scope of Work

The desire is to move everything in CBF’s current Salesforce instance to a new instance of Salesforce using NPSP as the core managed package. Related packages and custom solutions for functional areas like program management will also need to be moved. The CBF is open to defining who and how all additional managed packages and custom solutions will be migrated. It may be a combination of the responding implementation vendor, CBF staff, and possibly the managed package vendor that are responsible for that migration work. It is the expectation of the CBF that the responding vendor will address and suggest a migration strategy for all applications and data currently in the Luminate CRM Salesforce instance. The CBF expects the responding vendor to take on all the work related to moving actual data and building out the core NPSP application.

The CBF needs to be fully live on the new solution before **June 30, 2022**, the current end of life date for Luminate CRM.

We request that the vendor respond to all requirements (with associated firm fixed or estimated pricing) for all components in their current Salesforce instance, unless otherwise stated below. Again, the vendor may suggest alternative migration strategies for packages and custom solutions that stretch beyond the Luminate CRM managed packages.

### 3.2.1 Functional Scope

#### Core LCRM

- Constituent Relationship Management
- Membership Management
- Fundraising/Development/Prospecting including online and batch gift processing.
- Major Donor Moves Management
- Campaign Management including source coding
- Acquisition finder number management (ability to pull acquisition data from a separate system based off a lockbox finder number and create a constituent in NPSP and add a gift)
- Event Management
- Volunteer Management
- Advocacy Management
- EPR Program Management
- Accounting Sub-Ledger and/or integration to Intacct Finance System
- EPR Program Management
- Additional Custom Objects (see current LCRM setup spreadsheet for details)

#### Additional Salesforce Add Ons and Managed Packages

- Box
- Appinium Learn Trac
- Conga
- Apsara (CBF will handle this setup)
- Linvio Event Management (CBF will handle the majority of this setup but needs help automating the migration of fields and other configurations)
- Rollup Helper
- DMI for Direct Marketing

#### Luminate Online

- CBF intends to keep Luminate online and use Omatic Cloud to provide the integration between the two systems. Implementation partner will need to provide coordination between Omatic, Blackbaud, and themselves to ensure a smooth transition when disconnecting Luminate Online from LCRM and syncing with NPSP.

### 3.2.2 Life Cycle Implementation Professional Services

1. Business Process Review to determine how to align CBF fundraising business process to NPSP standard functionality and industry best practices (fixed cost)
2. Requirements and Discovery (fixed cost)
3. Project Management for project implementation (time and materials budgetary estimate)
4. Configuration/Development -including working with CBF to integrate and setup 3<sup>rd</sup> party apps already in use in LCRM or needed as part of the build out of NPSP (budgetary range – hours and cost)
5. Data Conversion (budgetary range –hours and cost)
6. System Testing/Acceptance Testing (budgetary range –hours and cost)
7. Training and System Documentation (budgetary range –hours and cost)

8. Go live and post go live support (budgetary range –hours and cost)

#### 4 RFP Response

Offer shall be submitted in the format requested in “RFP Response Format” section. Offers in any other format may be rejected. Conditional Offers shall not be considered. Cover Letter to be signed by an authorized individual. Offer that is not signed may be rejected.

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#### [CBF Implementation Partner RFP Responses](#)

The following structure should be used in the offeror’s response to this RFP.

##### 4.1 CBF Evaluation Criteria

It is the CBF’s intent to make an award to Offeror that, in the opinion of the CBF, presents an offer that appears to be favorable to the CBF, based upon the scope, availability of services, quality of services, reputation, and price offered. The criteria for evaluation of responses will be:

- Offeror’s qualifications, project resources, client references
- A detailed technical offer including, but not limited to the following:
  - Clarity and reasonableness of proposed approach, method, accountability of implementing the solutions specified.
- Solution architecture and implementation and data conversion methodology
- Price Proposal

##### 4.2 Technical Proposal – Required Response Format

Please include all the requested information below in your response.

###### 4.2.1 *Cover Letter and Executive Summary*

Signed by authorized individual, scanned and inserted into the proposal.

###### 4.2.2 *Proposed Solution Overview*

Please provide a general solution overview,

###### 4.2.3 *Company, References and Team Resources*

###### 4.2.3.1 *Company Overview*

Please provide the following information on your organization:

## Company Information

- Name
  - Address
  - Phone
  - Email
- Company Website
- Number of years in the market
- Company Locations
- Number of Employees

## Financial Information

- Previous year gross revenue
- Previous year net income
- Stock marked listed (if applicable)
- Any additional information you feel would be helpful in demonstrating the financial stability of your organization.

### 4.2.3.2 References

Provide, at minimum, three (3) references, not including The Chesapeake Bay Foundation, identifying firms with requirements similar to those of the CBF. Provide the name of the firm, contact person, email and the telephone number. The CBF reserves the right to contact additional references not provided by Offeror. Preference may be given for those references, which are most similar to the CBF, especially conversions from Luminate CRM to NPSP.

Please provide three references:

- Organization Name
- Contact
- Phone Number
- Email
- Description of work performed for client.

### 4.2.3.3 Team Resources

Provide a list of proposed personnel with resumes specifying qualifications and relevant experience. Describe the specific assignment these staff will have on the CBF project.

Should Offeror subcontract any part of the stated scope of work, please list and describe any subcontractor's qualifications and relevant experience. Describe how Offeror guarantees subcontractor performance. Offeror shall remain solely responsible for the performance of a resulting Contract from this RFP. All CBF payments for goods and/or services shall be made directly to the Offeror.

Vendor Staff:

- Resource Title
- Role
- Duration



- Estimated FTE% on Project

Please provide a suggested list of CBF staff needed for the project.

CBF Staff:

- Resource Title
- Role
- Duration
- Estimated FTE% on Project

#### *4.2.4 Proposed Implementation Approach*

Please answer the following questions to the best of your ability. Please feel free to add additional information/suggestions for the CBF's considerations based on your understanding of the project and industry best practices.

#### **Project Management**

1. Explain your project management methodology and how it benefits Salesforce NPSP implementations.
2. What tool/technology do you use for communication during the implementation for feedback and requirements updates/changes?
  - a. Is there any flexibility on which tool is used?
  - b. Will we have access to that system in perpetuity (for future reference)?
    - i. This could be answered by a simple "export" option used at the end of the project, that provides us with a file (or several) - we don't necessarily need active logins to the system in perpetuity.
  - c. Is it also used during Discovery and User Acceptance times (first few weeks and last few weeks of project)? Or are those times mostly meetings without much need for back-and-forth messaging?
3. How many LCRM to NPSP migrations have you managed? If you haven't done any, please list other source systems to NPSP migrations your company has managed.

#### **Implementation**

1. Requirements/Design/Business Process Review
  - a. Assuming we have a signed contract by 7/1/2021, how quickly could you assign resources and begin the project?
  - b. Describe the requirements/design approval process?
  - c. What is the change management process for minor and major changes in current system once the initial design is approved?
  - d. Describe your methodology for working with customers to fit existing business process into standard Salesforce/NPSP functionality vs creating new customized solutions.
  - e. Are there any proprietary applications that you provide that the CBF might want to consider as part of the implementation?
2. Additional Costs

- a. Identify any other tools/software/technology that The CBF will be required to purchase as part of this implementation and provide estimated costs.
- 3. Schema Moves
  - a. Can you explain what method you use for the implementation in terms of fields/objects/customizations/packages that will need to move from LCRM to NPSP?
    - i. How do you move or re-create existing environment in NPSP (where needed) and the extract existing schema and customizations?
- 4. Data Migration
  - a. What tools are used to migrate the data between the two systems?
  - b. How many data loads are included in your proposal?
  - c. What is the procedure for approving the data loaded into NPSP?
- 5. Go Live
  - a. What is the likely blackout period when doing the final data migration to NPSP?
  - b. Do you have experience syncing Salesforce NPSP to an existing Luminate Online system?
- 6. Knowledge Transfer and Training
  - a. Describe your training approach (ex. train the trainer etc.).
  - b. What artifacts to you provide to document configurations and customizations in the system?
- 7. Post Go Live Support
  - a. Describe your recommendation for post go live support in terms of hours, dollars, and length of support needed by most clients.

## 4.3 Cost Proposal – Required Response Format

### 4.3.1 Proposed Implementation Services and Costs

This section identifies the Implementation Services desired by CBF. Please feel free to expand and/or modify this list based on your firm's proposed approach. Please include cost estimates and fixed cost vs. budget estimates.

1. Project Management (time and materials budgetary estimate)
2. Requirements/Discovery Phase (fixed cost)
3. Business Process Review Phase–The CBF would like to review processes that fall outside standard NPSP functionality to modify where possible those processes to align with NPSP functionality and industry best practices. (fixed cost)
4. Design Phase/Configuration/Development Phase (budgetary range –hours and cost)
5. Data Conversion Phase (budgetary range (hours and cost)
6. Acquisition Finder Number Management (hours and cost)
7. System testing/Acceptance Testing Phase (budgetary range –hours and cost)
8. Training/Knowledge Transfer/System Documentation --- Technical and End User (budgetary range (hours and cost)
9. Post Go Live/Shake Out support (budgetary range (hours and cost)

### 4.3.2 Payment Schedule

Please provide a proposed payment schedule based upon deliverables and/or key milestones throughout the implementation life cycle.

### 4.3.3 Labor Rate Card

Please list the hourly/daily rates for the staff listed in the table below. Please feel free to add additional resources as required. Please include any discounts that are available. Please list any work that will be on-site at CBF headquarters. Please include all travel related costs within your hourly rate.

Please use the table below as a guide for your response.

Role	Standard Price	Discounted Rate
Project Manager		
Technical Lead		
Business Analyst Lead		
Trainer		

### 4.4 Proposed Agreements – Required Contract Documents

Please include the following documents described as part of your proposal. CBF anticipates reviewing all terms and conditions and will provide feedback and/or comments prior to contract award.

- Professional Services Statement of Work (SOW)