



Request for Proposal:

Owner's Representative/Project Manager for Salesforce CRM Project

ORGANIZATIONAL INFORMATION:

Name: Chesapeake Bay Foundation, Inc.
Address: 6 Herndon Avenue
Annapolis, MD 21403
Contact: Kristin Urban

ISSUE DATE: August 25, 2021

SUMMARY OF NEED/PROJECT DESCRIPTION:

The Chesapeake Bay Foundation (CBF) is looking for a part time owner's representative and project manager to help manage the migration of their legacy Salesforce CRM system built by Blackbaud to Salesforce's NPSP CRM system, managed packages, and related 3rd party applications and integrations. CBF is in the process of contracting with a Salesforce certified implementation partner who will manage the migration. This role will partner with the Director of Information Technology and work closely with the implementation partner to manage CBF's internal tasks and schedule and coordinate with all 3rd party vendors to make sure the project is completed on time and budget.

We anticipate needing 5 hours a week of support to augment work by the Director of Information Technology. Specific roles and responsibilities to be determined during project planning.

SCOPE OF WORK:

- Provide subject matter expertise to help to CBF as it pertains to the migration of data and business process from Luminate CRM to Salesforce NPSP
- Review and provide feedback on work of Salesforce NPSP implementation partner to CBF
- Help create and manage CBF internal project management schedule
- Help create and advise on internal change management plan
- Assist with weekly meetings (internally and with implementation partner)
- Assist CBF Director of Information Technology with project as needed

THE SCHEDULE:

We request that your proposal be delivered electronically via [file upload link](#) no later than 5:00pm on Friday September 3rd, 2021.

It is the intent of CBF to make a selection no later than September 17th, 2021. We will notify you once a decision for award of bid is made.

The schedule requires that the selected entity be available to start by October 1, 2021 and complete the work by March 31st 2022.

MINIMUM REQUIREMENTS:

At a minimum, you must be able to provide the following:

- Demonstrated experience helping manage enterprise scale CRM projects (minimum 2)
- Demonstrated experience with Salesforce, especially the Non-Profit Cloud
- Demonstrated experience working with non-profits, especially non-profit fundraising
- Experience with LCRM migrations a plus
- Project management certification a plus

INTERVIEWS:

Interviews will be conducted with a selection of candidates at the discretion of CBF. All interviews will be conducted remotely via video conferencing.

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.

FOR FURTHER INFORMATION OR QUESTIONS:

Please email: cbfinfotech@cbf.org

BID RESPONSE FORM:

Please complete the following information for your response:

1. The name and full contact information of your company and, if applicable, any other entity comprising your team: [Attach resumes of individuals involved.]
2. List and describe two projects completed within the previous five years that are relevant to this project. If the relevance is not immediately obvious, please describe

briefly the relationship as you see it: [Attach additional information as appropriate.]

3. List three client references and their contact information for whom you or your team members have completed work similar to that described in this RFP:

4. Include basic information and history about the business entity, financial information, technical capability, and any other information you feel is important for us to know.

5. Fee Proposal, detailed to the greatest extent possible – cost for service: hourly rates (if applicable), typical direct out of pocket costs such as travel reimbursement, copies, mailings etc...., and any other anticipated expenses that you foresee:

6. Additional information, such as you/your team member's particular experiences, training, and/or academic background(s) that may make you uniquely qualified for this position (such as experience with ...): [Attach additional materials as appropriate.]

A successful applicant may need to provide proof of insurance based on the services or product provided.

The undersigned certifies that the information submitted above is true and accurate. The undersigned certifies that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the Chesapeake Bay Foundation for consideration in the award of a contract.

The undersigned further certifies that the firm, association, or corporation or any person in a controlling capacity associated therewith or any position involving the administration of federal funds; is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency; has not been suspended, debarred voluntarily excluded, or determined ineligible by any federal agency within the past three years; does not have a proposed debarment pending; and has not been indicted, convicted, or had a civil judgment rendered against said person, firm, association, or corporation by a court of competent jurisdiction on any manner involving fraud or official misconduct within the last three years.

I further acknowledge that by signing this page of the proposal, I am deemed to have agreed to the provisions of the affidavit.

(Name of Firm)

(Authorized Signature)

(Title)

(Please print Name)

(Date)