



## Request for Proposals: (Salesforce Administrator Consulting)

### ORGANIZATIONAL INFORMATION:

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

**ISSUE DATE:** July 8, 2022

**SUMMARY OF NEED:** The Chesapeake Bay Foundation (CBF) is seeking a Salesforce Certified Administrator to assist with work-item overflow resulting from a successful database transition from one Salesforce instance to another.

### THE PROJECT:

The Chesapeake Bay Foundation recently transitioned from Luminate CRM to the Non-Profit Success Pack. Both database products utilize the Salesforce.com platform. Overall, it was a successful transition, but the volume of admin work needed to complete implementation, in addition to addressing regular daily admin work proved too much to handle “in-house”. We have all the implementation work overflow listed in a ticketing system that is no longer accepting new requests. It has been categorized and prioritized, with a rough total of 45 items that need to be addressed with standard Salesforce admin work. The type of work ranges from new custom fields to complex declarative automation.

### SCOPE OF WORK:

1. Build/create/adjust items in a Salesforce sandbox as directed by roughly 45 tickets housed in a Smartsheet environment. Each ticket represents about 1-2 hours of work, for a total of roughly 50-100 hours.
  - a. Items include custom objects, custom fields, page layouts, lightning page layouts, compact layouts, record types, page layout assignments, flows, validation rules, email alerts, actions, buttons, links, field dependencies, history tracking, custom tabs, custom permissions, custom metadata types, custom setting definitions, system permissions, apps, and some light solutioning.
  - b. Declarative automation should avoid using workflow rules and process builder.
  - c. In addition to standard Salesforce and NPSP features, we have the following tools to help accomplish tasks:
    - i. Apsona base product
    - ii. Apsona multi-step reports

- iii. Apsona de-dupe and match
  - iv. Apsona document generation
  - v. Rollup Helper
  - vi. Cloud4J Report Builder
2. Inform CBF's Data Team of items completed and ready for review by updating the ticket status.

## **THE SCHEDULE:**

We request that your proposal be delivered electronically to CBF staff member Joe Rankin [via this file upload link](#) no later than 5:00pm on 7/22/2022.

It is the intent of CBF to make a selection no later than 7/29/2022. We will notify you once a decision for award of bid is made.

The schedule requires that the selected entity complete the project by 9/30/2022.

## **MINIMUM REQUIREMENTS:**

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

- Salesforce Administrator Certification
- 2 years of Salesforce admin experience, preferably in the non-profit space
- Certificate of Insurance

## **INTERVIEWS:**

We may ask to conduct a short interview (no more than 1 hour in length by video conference as part of the selection process.

## **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:**

Joe Rankin - jrankin@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 three 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 : [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.

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(Name of Firm)

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(Authorized Signature)

(Title)

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(Please print Name)

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(Date)