Request for Proposals: Implementation of Microsoft Dynamics CRM for Non-Profits

What we are seeking:
CGIAR is seeking a firm to support in the implementation and roll out of Microsoft Dynamics Customer Relations Management (CRM) tool. The process will include scoping, analysis, design & implementation, reports building, training and technical support.

Deliverables and timeline:

Phase 1: Project scoping and analysis (F2F in Montpellier if feasible)
- Advise on the CRM modules required.
- Advise on the licencing required and cost estimate. We estimate the need to have 2 administrators and 15 users initially.
- Agree on the required custom fields required by CGIAR for Funder, Partner and Events management
- Agree on how the CRM will help the unit with its Funder Engagement plan (what needs to be prepared in terms of concept notes, tasks for each funder / partner)
- Advise and assist CGIAR in integration with Microsoft Office 365: tools such as Outlook, Calendar, SharePoint, Teams, Planner and reports building on the CRM / Power BI. See excel file for full list of requirements

Phase 2: Design and implementation
- Defining and documenting the roles, users and business processes and lay-out in one overall manual.
- Advise and assist CGIAR in technical roll-out of the CRM in order to make the solution accessible for all designated users
- Design of the data architecture:
  - Define the Funder / Partner level (organization/account),
  - Define and create our funding source streams (W1/W2/W3/bilateral) and load amounts in the funding source streams per year
  - Manage Funding status per funding stream: Indicated /committed /received /Pipeline
  - Manage tasks related to each Funder such as: due date to sign agreement, acknowledgment letters when funding has come in, etc.
- Assist in importing account/contact data as well as historic funding data
• Assist in customizing the Accounts page and dashboard
• Assist in customizing the Contacts page
• Customizing the Events page and dashboard (which include summary of how many calls, emails, events, meetings at any point in time)
• Developing 5 types of custom reports (e.g.: Developing Funding stream (indicated, committed, signed, target) and risk profile report / dashboard
• Design Event strategy and report
• Optional requirement (to be quoted separately): Integrate Dynamics CRM accounts with CGIAR’s current social media tools (Facebook, Twitter and LinkedIn) to allow us to monitor hashtags and engagement by Funder e.g.: hashtags/all CGIAR mentions / identify influential users who are mentioning or tagging CGIAR work). The system should be able to generate reports / exports of this information. Additionally, the tool should ideally also track CGIAR’s usage of specific hashtags and mentions.

Training
• Training of 2-3 super users for advanced use of the CRM tool (importing data, customizing objects and views, building reports, building graphs)
• Training of 2 users on the administration of the CRM tool
• Development of end-user training materials for the main modules implemented

Support
• Annual support to solve issues or contribute to further development, with a minimum of 10 days on-demand.

Schedule and Dates
The following schedule includes key milestones and their associated completion dates and is provided primarily for planning purposes. CGIAR System Organization may modify the project timeline at its discretion.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Target dates</th>
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<tbody>
<tr>
<td>Publish RFP Notice</td>
<td>May 05, 2020</td>
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<tr>
<td>End of inquiry period for RFP clarification (bidder)</td>
<td>May 14, 2020</td>
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<tr>
<td>Response to inquiries shared and FAQs published on CGIAR website</td>
<td>May 18, 2020</td>
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<tr>
<td>RFP submission due (bidder)</td>
<td>May 25, 2020</td>
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<tr>
<td>Notification to the successful bidder</td>
<td>May 29, 2020</td>
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<tr>
<td>Contract execution with CGIAR System Organization</td>
<td>June 03, 2020</td>
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<tr>
<td>CRM Project analysis, design, implementation (reports/dashboards) &amp; training</td>
<td>July 25, 2020</td>
</tr>
<tr>
<td>Launch of CRM platform</td>
<td>July 27, 2020</td>
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Knowledge, skills, and abilities:
• Credible and referenced track-record of the firm responding to the RFP;
• Experience working with firms in public or private sector of similar size to the
  CGIAR System Organization.
• Knowledge and demonstrable extensive experience in implementing Dynamics for non-
  profits and developing user-friendly reports.
• Proven excellent written and oral communication skills in English.

Evaluation Criteria:
An internal review committee has been established to assess the proposals. Following receipt
of the proposals, the committee will analyze the proposals, and if shortlisted, the vendor will
be invited to a virtual call to present their proposal.

The Evaluation Criteria to select a consultant will be as follows:

i) Technical Evaluation – 60%
   • Company / Consultant profile: 10%
   • Proposed project approach: 25%
   • Proposed team composition, skills and experience 25%

The Technical Proposal should include:
– Company profile – brief description of the company, how many clients do you have, and list 3 references
– Portfolio of 3 similar projects
– Composition of team allocated for the project and timelines
– Details on the project management process

ii) Financial Evaluation: 40%

The Cost proposal should be broken down by activity as follows:
– Analysis Scoping
– Development & Design
– Training
– Support
– Licensing cost
– Optional: Integration of Dynamics CRM accounts with CGIAR's current social media tools.

How to submit a proposal:
Please submit a narrative proposal and a budget proposal (in English) as two separate
documents to
smo-procurement@cgiar.org. Both documents can be attached to the same email.

Narrative proposal will consist of no more than 10 pages using Microsoft Word or similar
format, font size 11pt., margins no smaller than one inch.
Budget proposal will be presented using Microsoft Excel or similar format and consist of, at a minimum, the following line items: consultant time, resources, travel. The budget will be presented in US dollars.

All proposals must be received no later than 24:00 CEST, May 25 2020. Only electronically submitted proposals will be considered. Late proposals will not be considered.

Who we are:

CGIAR is a global research partnership for a food-secure future. CGIAR science is dedicated to reducing poverty, enhancing food and nutrition security, and improving natural resources and ecosystem services. Its research is carried out by 15 CGIAR Centers in close collaboration with hundreds of partners, including national and regional research institutes, civil society organizations, academia, development organizations, and the private sector. These 15 Centers have close to 10,000 staff based in over 50 countries.

The CGIAR System Organization, which is an international organization headquartered in Montpellier, France, provides governance to the CGIAR System in collaboration with the System Council and has about 40 staff. The Organization is committed to cultivating a work environment that reflects teamwork, gender equality, and respect for diversity. We endeavor to foster a multi-cultural environment that is free of any form of harassment and discrimination; and that embraces and values individuals regardless of age, ethnicity, race, gender, national or social origin, marital status or any other form of personal identity.

Please find more information about CGIAR at www.cgiar.org