



**REQUEST FOR PROPOSAL (RFP)**  
**94747\_ Salesforce Professional Services**

	DATE: June 25, 2020
	REFERENCE: 94747

Dear Sir / Madam:

United Nations Volunteers administered by United Nations Development Programme (UNV) kindly requests you to submit your Proposal for Salesforce Professional Services.

Please be guided by the form attached hereto as Annex 2, in preparing your Proposal.

Proposals may be submitted on or before **Friday, July 10, 2020** and via email to the address below:

**United Nations Volunteers**  
**Madalina Florica**  
**procurement@unv.org**

Your Proposal must be expressed in English, and valid for a minimum period of 120 days.

In the course of preparing your Proposal, it shall remain your responsibility to ensure that it reaches the address above on or before the deadline. Proposals that are received by UNV after the deadline indicated above, for whatever reason, shall not be considered for evaluation. If you are submitting your Proposal by email, kindly ensure that they are signed and in the .pdf format, and free from any virus or corrupted files.

Services proposed shall be reviewed and evaluated based on completeness and compliance of the Proposal and responsiveness with the requirements of the RFP and all other annexes providing details of UNV requirements.

The Proposal that complies with all of the requirements, meets all the evaluation criteria and offers the best value for money shall be selected and awarded the contract. Any offer that does not meet the requirements shall be rejected.

Any discrepancy between the unit price and the total price shall be re-computed by UNV, and the unit price shall prevail and the total price shall be corrected. If the Service Provider does not accept the final price based on UNV's re-computation and correction of errors, its Proposal will be rejected.

No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted by UNV after it has received the Proposal. At the time of Award of Contract or Purchase Order, UNV reserves the right to vary (increase or decrease) the quantity of services and/or goods, by up to a maximum twenty-five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.

Any Contract or Purchase Order that will be issued as a result of this RFP shall be subject to the General Terms and Conditions indicated herein. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP in this link: <http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html>

Please be advised that UNV is not bound to accept any Proposal, nor award a contract or Purchase Order, nor be responsible for any costs associated with a Service Providers preparation and submission of a Proposal, regardless of the outcome or the manner of conducting the selection process.

UNDP's vendor protest procedure is intended to afford an opportunity to appeal for persons or firms not awarded a Purchase Order or Contract in a competitive procurement process. In the event that you believe you have not been fairly treated, you can find detailed information about vendor protest procedures in the following link: <http://www.undp.org/content/undp/en/home/operations/procurement/protestandsanctions/>

UNV encourages every prospective Service Provider to prevent and avoid conflicts of interest, by disclosing to UNV if you, or any of your affiliates or personnel, were involved in the preparation of the requirements, design, cost estimates, and other information used in this RFP.

UNV implements a zero tolerance on fraud and other proscribed practices, and is committed to preventing, identifying and addressing all such acts and practices against UNV, as well as third parties involved in UNV activities. UNV expects its Service Providers to adhere to the UN Supplier Code of Conduct found in this link : [http://www.un.org/depts/ptd/pdf/conduct\\_english.pdf](http://www.un.org/depts/ptd/pdf/conduct_english.pdf)

Thank you and we look forward to receiving your Proposal.

Sincerely yours,

*Julie Spiller* *Julie Spiller*  
Team Leader, Procurement Unit  
6/26/2020

## Annex 1

## Description of Requirements

Context of the Requirement	<i>Salesforce CRM System</i>
Implementing Partner of UNV	UN SDG Action Campaign
Brief Description of the Required Services	Implementing and configuring the Salesforce CRM system for the Campaign and integrate it with the systems that the Campaign is using or plans to be using including Office 365, Teams, SharePoint and Click-Up
List and Description of Expected Outputs to be Delivered	<ol style="list-style-type: none"> <li>1. Configuration of the Salesforce Platform for the Organisation.</li> <li>2. Setup of Salesforce marketing cloud for the Campaign: create specific reports and dashboards. Specifically, a monitoring management dashboard of team activities and workplans and applying metadata for cross-referencing.</li> <li>3. Implementation of Salesforce as CRM System for the Campaign (Customizing fields &amp; objects, layouts and automations)</li> <li>4. Integration of workstreams from Salesforce with Office365, Outlook, Teams, SharePoint and Click-up</li> <li>5. Data Integration from the Campaigns existing collaborations spaces into the new system</li> <li>6. Provide training on Salesforce to the Campaign Team online or onsite.</li> <li>7. Advise the project group on using Salesforce in collaboration with Click-Up and document management systems in a team environment (user protocols and best practice)</li> </ol>
Person to Supervise the Work/Performance of the Service Provider	Designated staff, UN SDG Action Campaign
Frequency of Reporting	N/A
Progress Reporting Requirements	N/A
Location of work	On-site (Platz der Vereinten Nationen 1, 53113 Bonn) or remotely via teleconference
Target start date	15 July 2020
Latest completion date	15 August 2020
Travels Expected	N/A
	N/A

Special Security Requirements	
Facilities to be Provided by UNV (i.e., must be excluded from Price Proposal)	N/A
Implementation Schedule indicating breakdown and timing of activities/sub-activities	<input checked="" type="checkbox"/> Not Required
Names and curriculum vitae of individuals who will be involved in completing the services	<input checked="" type="checkbox"/> Required
Currency of Proposal	<input checked="" type="checkbox"/> United States Dollars <input checked="" type="checkbox"/> Euro
Value Added Tax on Price Proposal	<input checked="" type="checkbox"/> must be exclusive of VAT and other applicable indirect taxes
Validity Period of Proposals (Counting for the last day of submission of quotes)	<input checked="" type="checkbox"/> 120 days  In exceptional circumstances, UNV may request the Proposer to extend the validity of the Proposal beyond what has been initially indicated in this RFP. The Proposal shall then confirm the extension in writing, without any modification whatsoever on the Proposal.
Partial Quotes	<input checked="" type="checkbox"/> Not permitted
Payment Terms	Within thirty (30) days from the date of meeting the following conditions: SDG's written acceptance (i.e., not mere receipt) of the quality of the outputs; and Receipt of invoice from the Service Provider.
Person(s) to review/inspect/ approve outputs/completed services and	Global Director UN SDG Action Campaign

authorize the disbursement of payment	
Criteria for Contract Award	<input checked="" type="checkbox"/> Highest Combined Score (based on the 70% technical offer and 30% price weight distribution) <input checked="" type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criteria and cannot be deleted regardless of the nature of services required. Non acceptance of the GTC may be grounds for the rejection of the Proposal.
Criteria for the Assessment of Proposal	<p><b><u>Technical Proposal (70%)</u></b></p> <input checked="" type="checkbox"/> Expertise of the Firm 30% <input checked="" type="checkbox"/> Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan 10% <input checked="" type="checkbox"/> Management Structure and Qualification of Key Personnel 30%
	<p><b><u>Financial Proposal (30%)</u></b></p> <p>To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNV.</p>
UNV will award the contract to:	<input checked="" type="checkbox"/> One and only one Service Provider
Type of Contract to be Signed	<input checked="" type="checkbox"/> Purchase Order
Contract General Terms and Conditions <sup>1</sup>	<input checked="" type="checkbox"/> General Terms and Conditions for de minimi contracts (services only, less than \$50,000)  Applicable Terms and Conditions are available at: <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
Annexes to this RFP	<input checked="" type="checkbox"/> Form for Submission of Proposal (Annex 2) <input checked="" type="checkbox"/> Detailed TOR (Annex 3)

<sup>1</sup> Service Providers are alerted that non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process.

Contact Person for Inquiries (Written inquiries only) <sup>2</sup>	<i>Madalina Florica</i> <i>Procurement Assistant</i> <i>procurement@unv.org</i> Any delay in UNV's response shall be not used as a reason for extending the deadline for submission, unless UNV determines that such an extension is necessary and communicates a new deadline to the Proposers.
Other Information	N/A

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<sup>2</sup> This contact person and address is officially designated by UNV. If inquiries are sent to other person/s or address/es, even if they are UNV staff, UNV shall have no obligation to respond nor can UNV confirm that the query was received.

**FORM FOR SUBMITTING SERVICE PROVIDER'S PROPOSAL<sup>3</sup>**

***(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery<sup>4</sup>)***

[insert: Location]

[insert: Date]

To: [insert: Name and Address of UNDP focal point]

Dear Sir/Madam:

We, the undersigned, hereby offer to render the following services to UNV in conformity with the requirements defined in the RFP dated [specify date], and all of its attachments, as well as the provisions of the UNDP General Contract Terms and Conditions:

**A. Qualifications of the Service Provider**

*The Service Provider must describe and explain how and why they are the best entity that can deliver the requirements of UNV by indicating the following:*

- a) Profile – describing the nature of business, field of expertise, licenses, certifications, accreditations;*
- b) Business Licenses – Registration Papers, Tax Payment Certification, etc.*
- c) Latest Audited Financial Statement – income statement and balance sheet to indicate its financial stability, liquidity, credit standing, and market reputation, etc. ;*
- d) Track Record – list of clients for similar services as those required by UNV, indicating description of contract scope, contract duration, contract value, contract references;*
- e) Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc.*
- f) Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List.*

**B. Proposed Methodology for the Completion of Services**

*The Service Provider must describe how it will address/deliver the demands of the RFP; providing a detailed description of the essential performance characteristics, reporting conditions and quality assurance mechanisms that will be put in place, while demonstrating that the proposed methodology will be appropriate to the local conditions and context of the work.*

<sup>3</sup> This serves as a guide to the Service Provider in preparing the Proposal.

<sup>4</sup> Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes

**C. Qualifications of Key Personnel**

*If required by the RFP, the Service Provider must provide:*

- a) Names and qualifications of the key personnel that will perform the services indicating who is Team Leader, who are supporting, etc.;*
- b) CVs demonstrating qualifications must be submitted if required by the RFP; and*
- c) Written confirmation from each personnel that they are available for the entire duration of the contract.*

**D. Cost Breakdown per Deliverable\***

	<b>Deliverables</b> <i>[list them as referred to in the RFP]</i>	<b>Percentage of Total Price</b> <i>(Weight for payment)</i>	<b>Price</b> <i>(Lump Sum, All Inclusive)</i>
1	Deliverable 1		
2	Deliverable 2		
3	....		
	Total	100%	

*\*This shall be the basis of the payment tranches*

**E. Cost Breakdown by Cost Component [This is only an Example]:**

<b>Description of Activity</b>	<b>Remuneration per Unit of Time</b>	<b>Total Period of Engagement</b>	<b>No. of Personnel</b>	<b>Total Rate</b>
<b>I. Personnel Services</b>				
1. Services from Home Office				
a. Expertise 1				
b. Expertise 2				
2. Services from Field Offices				
a. Expertise 1				
b. Expertise 2				
3. Services from Overseas				
a. Expertise 1				
b. Expertise 2				
<b>II. Out of Pocket Expenses</b>				
1. Travel Costs				
2. Daily Allowance				
3. Communications				
4. Reproduction				
5. Equipment Lease				
6. Others				
<b>III. Other Related Costs</b>				

*[Name and Signature of the Service Provider's  
Authorized Person]*

*[Designation]*

*[Date]*



## TERMS OF REFERENCE: Salesforce Professional Services

### Background

The UN SDG Action Campaign is a special inter-agency initiative of the UN Secretary-General administered by the United Nations Development Programme (UNDP). The UN SDG Action Campaign's mission is to scale up, broaden and sustain the global movement of action for the SDGs.

The UN SDG Action Campaign serves as a hub to inspire people's action on the Sustainable Development Goals, connect and amplify stakeholder efforts, showcase impact, share best practices, incubate and test out innovative efforts around SDG action and advocacy whilst encouraging and make available SDG accountability mechanisms, including citizen-generated data.

### Scope of Work

The UN SDG Campaign engages with a wide range of partners through different initiatives such as *Global Week for Act4SDGs*, *SDG Action Awards*, *the MYWorld Global Survey* and *SDG Global Festival of Action*. The information on these partners is currently dispersed in different online systems and data sheets, and little record is kept, if any, of the interaction with them. The Campaign decided to streamline partner information through the CRM System Salesforce and define a personalized journey for each partner.

The scope of work includes implementing and configuring the Salesforce CRM system for the Campaign and integrate it with the systems that the Campaign is using or plans to be using including Office 365, Teams, SharePoint and Click-Up to ensure all systems will be working seamlessly.

### Deliverables

1. Configuration of the Salesforce Platform for the Organisation.
2. Setup of Salesforce marketing cloud for the Campaign: create specific reports and dashboards. Specifically, a monitoring management dashboard of team activities and workplans and applying metadata for cross-referencing.
3. Implementation of Salesforce as CRM System for the Campaign (Customizing fields & objects, layouts and automations)
4. Integration of workstreams from Salesforce with Office365, Outlook, Teams, SharePoint and Click-up
5. Data Integration from the Campaigns existing collaborations spaces into the new system
6. Provide training on Salesforce to the Campaign Team online or onsite.
7. Advise the project group on using Salesforce in collaboration with Click-Up and document management systems in a team environment (user protocols and best practice)

### Qualifications

#### Company

- Demonstrated expertise in the implementation of Salesforce systems used by multiple business units.

- Expertise in Integration of Salesforce systems with productivity tools such as Office365, Outlook, Teams, SharePoint and Click-Up.
- Expertise in configuring end-to-end partner management using a CRM system.
- Expertise in training clients on Salesforce in combination with project management and collaboration systems.
- Hands-on experience in testing and troubleshooting the integration and configuration issues.

#### Personnel

- Demonstrated expertise in the implementation of Salesforce systems used by multiple business units.
- Expertise in Integration of Salesforce systems with productivity tools such as Office365, Outlook, Teams, SharePoint and click-up.
- Expertise in configuring end-to-end partner management using a CRM system.
- Expertise in training clients on Salesforce in combination with project management and collaboration systems.
- Hands-on experience in testing and troubleshooting the integration and configuration issues.
- Works well in a multicultural team and has a strong work ethic; strives to deliver high-quality, error-free deliverables.
- Highly organized and autonomous, able to multi-task and prioritize workload when necessary.
- Excellent writing and documentation skills, demonstrating high levels of attention to detail.

#### Evaluation Criteria for Award Contract

Companies will be evaluated based on the following methodologies:

##### Cumulative analysis

When using this weighted scoring method, the award of the contract should be made to institution whose offer has been evaluated and determined as:

a) responsive/compliant/acceptable, and

b) Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.

\* Technical Criteria weight; 70%

\* Financial Criteria weight; 30%

Only institutions obtaining a minimum of 70% would be considered for the Financial Evaluation. The candidate obtaining the overall highest score after adding the technical score and the financial score will be awarded the contract.

**Points Obtainable****Summary of Technical****Proposal Evaluation Forms**

1.	Expertise of the firm	300
2.	Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan	100
3.	Management Structure and Qualification of Key Personnel	300
	<b>Total</b>	<b>700</b>

**DOCUMENTS TO BE INCLUDED WITH THE PROPOSAL**

The contractor shall include the following documents:

- CVs of the dedicated staff.
- Annex 2
- References from similar projects.

**FINANCIAL PROPOSAL**

A lump sum, all-inclusive price should be offered. The bidder should provide a cost breakdown for personnel services, including remuneration per hour for Salesforce expertise.

**Language Requirements**

Fluency in English is required.

**DURATION OF THE WORK**

The UN SDG Action Campaign is located in Bonn, Germany. The work should be delivered on-site or remotely via teleconference. Project end: 15 August 2020.