

Request for Qualifications

[Social Venture Partners International](#) seeks a qualified Salesforce consultant for a substantial Salesforce migration project.

ABOUT SOCIAL VENTURE PARTNERS INTERNATIONAL

Over nearly two decades, SVP's global network has worked with thousands of philanthropists ("Partners") – transforming how they give and creating ripple effects across communities as more than 70% increase their giving and volunteerism. Worldwide, our affiliates have collectively supported 900+ nonprofits with \$70 million (USD) and countless volunteer hours. Each SVP affiliate invests in their local community, but is connected to the global movement woven together by SVP International. Together, we aim to build a global movement of Partners working in their communities to create a world where all people have the opportunity to lead productive and meaningful lives.

Our team of 8 supports more than 40 SVP affiliate organizations in nine countries – and with 3,200 Partners, we are the largest network of engaged donors in the world. SVPI manages a shared instance of Salesforce used by 18 SVP affiliates. User profiles ensure that SVP affiliates only have access to their records. Over the last 12 years, business processes of these 18 affiliates have become increasingly unique, and our one-size-fits-all CRM is not adequately supporting their work. Additionally, the single shared Salesforce org limits affiliates from integrating Salesforce with their other systems (e.g., e-mail marketing, event management, bookkeeping, project management, and more).

PROJECT PHASES

This project will include two major phases:

Phase 1: Migrating 18 SVP affiliates onto their own Salesforce org, decentralizing the admin role.

Phase 2: Migrating SVPI to a 'new' Salesforce org designed for our data model which is different than the affiliates we serve.

ANTICIPATED SCOPE OF PHASE 1: SVP Affiliate Migration

Estimated timeline: January 2018 – October 2018

1.) Discovery & Identification of Requirements

- a. Focus Groups: We expect the consultant to speak (remotely) with staff from a sample of approximately 10 affiliates. These group conversations could be segmented by two main focus areas: partner engagement and nonprofit engagement.
- b. Assessment of Current Org: The consultant will review current SVPI documentation, org, and usage data to become familiar with current customizations and use.
- c. Data Model: Consultant will compile common requirements for SVP affiliates

2.) Solution Identification & Implementation Plan

- a. Evaluate Possible Solutions: Consultant will evaluate alignment of requirements with existing meta data and other available solutions like NPSP, recommending one standard solution for affiliate use.

- b. Project Planning: Consultants will outline and recommend a plan for implementing proposed solution and will work with SVPI to identify roles and responsibilities for SVPI, affiliates, and consultants.
- 3.) Implementation, Documentation, & Training
 - a. Org Set Up: With access to new affiliate Salesforce orgs (provided by SVPI and affiliates), consultants will work with SVPI to apply a standard combination of meta data and apps to set up each affiliate's basic SVP Salesforce org.
 - b. Migration: Consultant will lead migration efforts in partnership with skilled SVPI volunteers as determined in project plan roles and responsibilities.
 - c. Documentation: Consultants will create master documentation that can be used by affiliates to easily onboard new admins and/or Salesforce consultants to support future customizations.
 - d. Admin Training: In collaboration with SVPI, consultants will lead two initial admin training sessions, one in-person training at SVPI conference, and one virtual follow up.
 - e. User Training: In collaboration with SVPI consultants will lead a virtual user training.

ANTICIPATED SCOPE OF PHASE 2: SVPI Migration

Estimated timeline: May 2018 – November 2018

- 1.) Discovery & Identification of Requirements
 - a. Interviews: We expect the consultant to speak with 4-6 SVPI staff members.
 - b. Assessment of Current Org: The consultant will review current SVPI documentation to become familiar with current workflows and business processes that are integrated with Salesforce.
 - c. Data Model: Consultant will compile requirements for SVPI.
- 2.) Solution Identification & Implementation Plan
 - a. Evaluate Possible Solutions: Consultant will evaluate alignment of requirements with available solutions like NPSP, recommending a solution for SVPI use.
 - b. Project Planning: Consultants will outline and recommend a plan for implementing proposed solution and will work with SVPI to identify roles and responsibilities for SVPI and consultants.
- 3.) Implementation, Documentation, & Training
 - a. Org Set Up: Consultants will work with SVPI to apply solutions to SVPI's stand-alone Salesforce org.
 - b. Migration: Consultant will lead migration efforts in partnership with skilled SVPI volunteers as determined in project plan roles and responsibilities.
 - c. Documentation: Consultants will create master documentation that can be used to easily onboard new admins and/or Salesforce consultants to support future customizations.
 - d. Admin Training: Consultants will train SVPI admin in one main session
 - e. User Training: In collaboration with SVPI consultants will lead one in-person SVPI User training for the program and communications teams and one in-person user training for the development team.

Submission Summary

Submissions should include the following items along with other material to demonstrate consultants' expertise and capability:

- 1.) A brief summary of consultants' approach to the project with answers to the following questions:
 - a. What concerns do you have about the timeline and/or scope outlined above?
 - b. What experience do you have decentralizing a single salesforce org into many?
 - c. What additional information do you need in order to provide a cost estimate?
 - d. Please describe your process for generating admin and developer documentation for a new org.
 - e. SVPI's values are Connection, Stretch, Equity, and Ownership. [You can read more on the following page.](#) How do these values align with yours?
- 2.) The relevant expertise of the team assembled to carry out the work
- 3.) A list of comparable projects undertaken by consultant and team members
- 4.) Two client references.

Please direct submissions and inquiries to Emily Reitman, Senior Program Manager (Emily@svpi.org) no later than November 17, 2017.

Adopted by the SVPI Staff and Board on April 18, 2017

SVPI VALUES & BEHAVIORS

STRETCH

We believe there's always potential to do better

- Seek out diverse viewpoints and candid feedback
- Challenge and inspire those around us
- Take responsible risks and grow from success and failure

CONNECTION

We make a greater impact collectively

- Seek opportunities to build meaningful relationships
- Listen. Ask questions to learn
- Support and celebrate one another
- Assume positive intent

EQUITY

We believe in breaking down systemic and structural biases in resource distribution to ensure ALL people have the opportunity to succeed.

- Recognize privilege and seek to understand different life experiences
- Identify whose voice is not heard and engage them
- Recognize when others should lead and support them
- Acknowledge power imbalances and work to level them
- Treat everyone with dignity and respect

OWNERSHIP

We hold ourselves accountable for our actions and results

- Step up
- Do what we say we'll do
- Speak up when something appears wrong
- Ask, how can I help you?
- Seek and embrace evaluation