



Request For Qualifications

Release Date: 5/29/2014

Qualifications Due: 6/13/2014

CRM Consultants

I. About the Agency

StopWaste is the Alameda County Waste Management Authority and the Source Reduction and Recycling Board operating as one public agency. StopWaste offers a wide variety of programs in the areas of waste reduction, public education, home composting, green building, recycled product procurement, and grants to non-profit organizations. StopWaste is committed to achieving a 75% and beyond diversion goal and promoting sustainable consumption and disposal patterns through programs that are designed to promote: waste prevention and reduction, reuse, and recycling.

StopWaste is requesting qualifications from firms or individuals to assist in Microsoft Dynamics CRM programming to support an existing CRM system.

II. Description of Services and Qualifications Required

StopWaste maintains a customized CRM system that is used to manage the implementation of the Mandatory Recycling Ordinance. StopWaste is seeking individuals or firms who can provide advanced customization of the CRM system, including but not limited to:

- Requirements gathering.
- Programming of existing and new work processes (including workflows, dialogs, forms, views, creation of entities, marketing lists).
- Data Migration tasks using Scribe Insight.
- Creation/maintenance of custom C# plug ins.
- Custom Reports using SSRS and Documents Core Pack.
- Training both end users and IT staff.

General Qualifications:

- The following insurance policies are required by our agency:
 - Comprehensive general liability insurance, including personal injury liability, blanket contractual liability, and broad-form property damage liability coverage. The combined single limit for bodily injury and property damage shall be not less than \$2,000,000.
 - Automobile bodily injury and property damage liability insurance covering owned, non-owned, rented, and hired cars. The combined single limit for bodily injury and property damage shall be not less than \$1,000,000.
 - Statutory workers' compensation and employer's liability insurance as required by state law.

- Professional Liability in Professional Liability Insurance. The limit of liability shall be not less than \$1,000,000.

Please state your current level of coverage for the above listed insurance requirements and your ability to attain the required levels indicated above.

III. Submittal Requirements

Firms or individuals responding to this RFQ must provide:

1. Summary of firm proposing to provide services.
2. Description of past projects that demonstrate the individual or firm's expertise in Microsoft Dynamics CRM programming and support. XRM projects involving Mobile access to CRM a plus.
3. At least three client references, including name, title, organization, email and phone number.
4. Professional fee schedule for personnel providing services to the Authority.

Unless specified in the submittals, the Agency will assume that the professional fee schedule will include any costs associated with complying with the Agency's insurance requirements as specified in Section II of this RFQ. The Agency will also assume that any work product developed as a result of contracting with Agency will become the property of Agency.

IV. Application Deadline and Instructions

Release of RFQ.....	5/29/14
Qualifications Due	6/13/14
<i>Qualifications are due at 5:00 p.m. and will not be accepted after this time.</i>	
Short List Interview (if needed)	6/19/14
Notification of selected vendors(s).....	6/23/14

The deadline for application submittal is **5:00 p.m., June 13, 2014.**

Submittal

One copy of the qualifications should be emailed, mailed or hand delivered to:

StopWaste
1537 Webster Street
Oakland, CA 94612
Attention: Mike Cohen

Email submittals should be sent to Mike Cohen at mcohen@stopwaste.org with the subject line clearly marked "**CRM RFQ Response**". Any email attachments must be less than 7MB.

Please note faxed responses will **not** be accepted. Qualifications received after the deadline above will **not** be accepted.

Candidates should plan to be available on June 19, 2014 if interviews are needed. Depending on the responses to this RFQ and the short list interview, the Agency will select more than one firm or individual.

V. *General Conditions*

All materials submitted become the property of StopWaste, and will not be returned. Funds awarded are public funds and any information submitted or generated is subject to public disclosure requirements.

The Agency reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the proposal, to accept or reject any or all proposals received, and/or to cancel all or part of this RFQ at any time prior to awards.