Request for Qualifications  
Salesforce Nonprofit Consultant  
Commonwealth Corporation

**Background**  
Commonwealth Corporation (CommCorp) is a quasi-public workforce development agency that strengthens the skills of Massachusetts youth and adults by investing in innovative partnerships with industry, education, and workforce organizations.

Our primary goals are

* to build regional industry training partnerships that prepare youth and unemployed workers for jobs in demand that lead to higher rates of employment;
* to upgrade the skills of underemployed workers to meet specific employer skill demands leading to job retention, upgrades and wage gains, and;
* to increase the share of youth engaged in education and employment pathways preparing them for postsecondary education and careers. Commonwealth Corporation’s goal is to extend Massachusetts’ leadership in education and training, and its overall prosperity, by ensuring that all people benefit from our economy.

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We are seeking a Salesforce Nonprofit Consultant or Managed Services Plan to serve in the following functions:

1. Facilitate a Salesforce Needs Assessment – Help us better understand our current use, gaps, and opportunities. Example deliverables may include, but are not limited to:
   1. Documenting our current organizational use and need
   2. Assessing opportunities for increased efficiency
   3. Assessing possibilities for future projects
2. Organization Clean up and Optimization – Trouble shoot existing problems, redundancies, and duplications for improvement and optimization of current tools and resources. Example deliverables may include, but are not limited to:
   1. Review and improve user role hierarchy, roles, and permissions
   2. Delete SF Admin profiles tied to workflows and other automated processes
   3. Assess and implement deduplication tools (for objects, fields, workflows, etc.)
   4. Streamline and reconfigure Form Assembly and workflow rules
   5. Assist with data cleaning process to ensure all data is accurate, reliable, and quality control procedures are in place to review and update on a regular basis while ensuring that staff have access to the system to do their jobs
   6. Reassign contact and develop workflows to automate this process for future use
3. Routine Maintenance – Upgrade technology as needed (including testing in Sandbox for new releases). Example deliverables may include, but are not limited to:
   1. Review previous updates and changes for impact on organization
   2. Review upcoming updates and changes to assess impact and facilitate updates
4. Staff Training and Support to Build Capacity – Salesforce Administrator & Technical Assistance team is supported on an ongoing basis. Example deliverables may include, but are not limited to:
   1. Explore grant management functionality
   2. Update and improve Constant Contact process for synching and updating lists
   3. Other training on salesforce uses and for salesforce super users to facilitate larger trainings
5. Provide recommended actions (both short term and long term) to address discovery and key findings as a final deliverable of the project.

1. Other projects to be defined and scoped separately.

We are seeking a consultant that would be available to support CommCorp between approximately February 1, 2021 – June 30, 2022, with potential for extension.

The estimated budget for this workstream is up to a maximum of $25,000.

Through this Request for Qualifications, we are asking for proposals for Salesforce consultant services, including managed services plans, from those with experience working with nonprofit organizations. For more information about CommCorp, our website address is www.commcorp.org.

Deadline for submission: No later than 5:00 p.m. on Friday, January 15, 2021.

**Interested applicants should submit a proposal that includes:**

* Resumes of staff that will be assigned to work with CommCorp
* Overview of the audit-process used to gain understanding of a client’s contact management needs
* Two references of organizations for which you have provided consulting services similar to those being requested in this RFQ
* Examples/case studies of previous nonprofit clients, detailing how needs were determined and the plan for implementation
* Submit a proposal with narrative of three pages or less that includes the following information and responses to the following:
  1. Salesforce Experience: A Description of Your Experience in Providing Salesforce Consulting services to organizations similar to Commonwealth Corporation
     + Please describe your approach to working with an organization to assessing the needs for a contact management system appropriate for the organization, and the process for eliciting business processes and mapping them to Salesforce
     + Please provide a specific example of an organization that you partnered with to provide Salesforce consulting services. Experience with using Form Assembly and Conga Composer is a plus
  2. Hours, Rates or Managed Services Plans
     + Please provide us with information about your rates or managed services plan(s)
     + Please confirm that staff is available to work on the project between February 1, 2021 – June 30, 2022.
* Organizations who are minority or female-owned enterprises are encouraged to apply. Please submit a copy of all relevant certification credential(s) with your application.

**Submission Instructions:**

* **Deadline for Submission:** applications received by Friday, January 15, 2021 will be considered first
* **Acceptance forms of delivery:** E-mail
* **Please direct any questions to Patience Misner by email at pmisner@commcorp.org**
* **Send complete Proposal to: pmisner@commcorp.org**

**RFQ Timeline:**

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| **Date** | **Activity** |
| **Tuesday, January 5, 2021** | **RFQ Released** |
| **Friday, January 15, 2021** | **Priority Application Deadline** |
| **End of January** | **Selection of vendor** |
| **February 2021** | **Vendor implements scope of agreement** |

In deciding which proposal should be approved, the Committee will consider the thoroughness and completeness of the response, the consultant’s experience, references, and any other relevant factor.

Commonwealth Corporation reserves the right to contact applicants for clarification or negotiation, to extend or revise any deadline, and to reject any and all proposals, in whole or in part, if deemed to be in the best interest of the Commonwealth.