Salesforce Integration Partner

A Request for Proposals issued on 2022-06-30

IETF Executive Director
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About the IETF

The Internet Engineering Task Force (IETF) is the premiere Internet standards body creating open protocols to ensure that the global Internet is built on the highest-quality technical standards. These standards, shaped by rough consensus and informed by running code, are developed by a large volunteer community of leading engineering and technical experts from around the world. IETF processes are open and transparent, and IETF standards are freely available to anyone.

Standards and protocols developed at the IETF provide a core framework for today's online world. Everything from video conferencing, to email, to cloud storage is built on standards developed in the IETF community. In short, our work makes the Internet work.

www.ietf.org

Overview

The IETF Administration LLC seeks a partner to guide the acquisition, account setup, design, customization, and implementation of the CRM database Salesforce to support our fundraising efforts as a global nonprofit. While the Internet Engineering Task Force (IETF) has been in existence for over 35 years, the IETF Administration LLC was established four years ago as a disregarded entity of the nonprofit Internet Society. Fundraising, other than for meeting sponsorship, was nascent prior to 2021, and as such, data conversion will be minimal. Integration of supporting technology will be expected. We seek a partner to guide us through this process, customize the Salesforce tool to meet our needs, and deliver a fully functional database for use within pre-established time constraints.

Timeline

30 June 2022	RFP Issued
14 July 2022	Questions and Inquiries deadline
21 July 2022	Answers to questions issued and RFP updated if required
25 August 2022	**Bids due**
08 September 2022	Preferred bidder selected and negotiations begin
22 September 2022	Contract execution and work begins

RFP Process

The process for the RFP is as follows:

1. The RFP is publicly issued, posted to our website[1] and announced to the RFP Announcement mailing list[2], to which anyone can subscribe.

2. Potential bidders have until 14 July 2022 to submit any questions by email to ietf-rfps@ietf.org. Questions will be treated as anonymous but not private, as explained below. If you do not receive confirmation that your questions have been received within 24 hours then resend until you do.

3. A written response to all questions is provided on or before 21 July 2022, direct to those parties that sent questions, by email to the RFP Announcement

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[1] https://www.ietf.org/about/administration/rfps-and-contracts/
[2] https://www.ietf.org/mailman/listinfo/rfp-announce

Mailing List and posted on our website[3]. The response will include the questions asked and the answers, but will not identify the company asking the question. If required, the RFP may be updated to correct or clarify any issues identified.

4. Bids are due by **25 August 2022** by email to ietf-rfps@ietf.org. If you do not receive confirmation that your bid has been received within 24 hours then please resend until you do. The bid should include the following information:

    a. Executive summary

    b. Project approach including any assumptions.

    c. A project plan and schedule for all the deliverables that must include when the work will begin and end, and any other milestones, as well as any dependencies that may delay delivery.

    d. A statement confirming that you can meet all the listed requirements along with any additional information needed to substantiate this.

    e. Key personnel experience and availability for the lifetime of the project.

    f. Fee and payment schedule. Fixed priced bids are preferred but if that is not possible then a maximum fee must be specified.

    g. A warranty including a proposal for fee reduction or refund due to late- or non-delivery.

5. The IETF Administration LLC and designated contractors and volunteers will select a preferred bid and notify the bidder by 08 September 2022.   The selection process may include questions by email and/or conference call.

6. The IETF Administration LLC then enters into contract negotiation with the preferred bidder, based on its standard contract and using the relevant sections of the Statement of Work below. If contract negotiation fails then a different preferred bidder may be chosen.

7. Contract negotiation is anticipated to complete by 22 September 2022 and result in the award of the contract. All RFP contract awards are posted on our website and announced to the RFP Announcement mailing list. The terms of the contract are later posted publicly on our website, with the fee information and signatures (where possible) redacted. In addition any Conflict of Interest declarations required of the preferred bidder are also posted publicly on our website. This transparency is non-negotiable.

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[3] https://www.ietf.org/about/administration/rfps-and-contracts/

8. Work generally begins immediately after award of the contract, unless specified otherwise in the Statement of Work or negotiated contract.

Jay Daley
IETF Executive Director
IETF Administration LLC

Statement of Work: Salesforce Integration Partner

Deliverables

1. A fully implemented and functional Salesforce CRM database specifically designed for the IETF Administration LLC's fundraising needs for up to 10 licensed users and 2,500 contacts. This includes targeted field customization.

2. Salesforce integration with IETF supporting technology:
   - GSuite Calendar - to allow scheduled meetings to be attached to a contact record
   - Email services used for staff.ietf.org - to allow sent and received emails to be attached to a contact record
   - GSuite G-Drive - to allow documents to be attached to a contact record
   - DocuSign - to allow contracts to be attached to a contact record
   - Slack (when available) - to allow discussion relevant to, or with a contact to be attached to a contact record

3. APIs that support live integration with the IETF Meeting Registration System. The IETF Meeting Registration System is used by participants at our IETF meetings (three a year) to register and pay. The system also includes functionality for people to donate to the IETF. The IETF needs this system integrated with Salesforce so that this donation information, along with details of the donor, is recorded in the Salesforce Database,

   The Salesforce Integration Partner will need to identify or develop APIs that the developers of the IETF Meeting Registration System can call and will need to support the developers to deliver a successful integration.

4. Integration with our website donations form. This is a custom form that uses Paypal as our backend payment processor. Integration could either be through Paypal or through the provision of APIs, similar to requirement 3 above.

5. Import of data exported from AMS ARO. AMS ARO is a CRM system developed and maintained by our outsourced Secretariat that has been used to record details of meeting sponsors.

   The Salesforce Integration Partner will need to work with the developers of AMS ARO to ensure they provide a suitable export and will then need to deliver a successful import of that data into the Salesforce database.

6. Up to 20 canned reports for ongoing use by development staff and leadership.

7. Training services for 3-5 other regular users (entering in new contacts, meetings, significant emails, etc) and 2 who may also have periodic gift entry.

8. Ongoing support services appropriate for our database size, number of users and planned usage.

Requirements

1. Extensive familiarity with implementation from Salesforce.org, not solely with Salesforce.com.

2. Excellent experience with implementing Salesforce integrations and knowledge of the range of integrations available.

3. Ability and willingness to utilize GoogleDocs/Google Sheets when collaborating on shared documents.

4. In addition to specifying fees for the specific deliverables above, bidders should provide a fee structure that will be used to scope and cost additional integration projects and database customization projects.

Additional Details

Datatracker

Datatracker[4] is a public facing document and workflow management tool used regularly by most active IETF participants. This is a custom tool, developed and maintained by the IETF tools team using open source technologies. Integration with Datatracker is through two mechanisms: API access to the underlying data, and OIDC access to use Datatracker for authentication.

It is likely that in future we will commission our Salesforce Integration Partner to develop a custom integration with Datatracker but that is not currently part of the deliverables.

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[4] https://datatracker.ietf.org

IETF LLC Email

While the IETF LLC uses GSuite for office functionality, it does not use Gmail as its email requirements are too complex. Instead it uses standard IMAP/SMTP interfaces and local email clients such as Apple Mail.

Sage Intacct

The IETF LLC is migrating soon to Sage Intacct as its core accounting system, managed by its outsourced CPA service provider. Sage Intacct has Salesforce integration built in and the CPA service provider will manage this integration. There is a possibility that the Salesforce Integration Partner may be required to make some minor configuration changes to Salesforce to support this work.

Planned users

This database is going to be accessed by between 5-7 users in the first several years, with only 1-2 of those being frequent users. Currently, we have one staff member proficient in Salesforce, and several who are generally tech-savvy. We anticipate that the proficient staff member will be the primary database manager.

ENDS