Lebanese Red Cross

Request for Proposals for a Salesforce CRM

8th of June 2021

1. Background

The Lebanese Red Cross (LRC) is the main provider of ambulance and blood transfusion services in Lebanon. It also provides disaster management services, primary health services, disaster risk reduction and other services.

The ambulance service relies heavily on volunteers, and LRC wishes to have a central database and CRM system for its 5000+ active volunteers spread in 93 different centers, with an annual turnover of around 1000 volunteers.

The blood transfusion services aims to recruit and retain 30,000+ regular blood donors (voluntary donors who donate blood at least twice per year).

LRC is also investing heavily into its fundraising capacities to be able to improve the long-term sustainability of the vital services that are provided to the population in Lebanon at no cost.

Part of this investment includes the development/customization of a CRM system to improve management of donors.

LRC will possibly extend the CRM at later stages to complaints management and program management.

LRC has opted for the implementation of Salesforce CRM solution, and is seeking implementation partners to provide the services listed in this RFP document.

2. Scope of work

The CRM solution will help LRC build a unified database for, and manage the relationships with, financial donors (Fundraising), blood donors, and volunteers.

2.1 Fundraising

The Lebanese Red Cross traditionally raised funds through face to face and local activities. Over the last 2 years, LRC has introduced digital fundraising with the objective of recruiting monthly donors.

LRC Fundraising channels

- Online via website and mobile app www.supportLRC.app
- Online via iRaiser.com
- Via email and wire transfer
- Via face to face contact and direct cash donations
- Via fundraising events
- Potentially via Facebook (donate button) in the future
- Institutional (not included in the scope)

Donors can be individuals, groups or corporates on all channels

What is required from the CRM for fundraising is the achievement of the following objectives:

- To be able to have visibility on all fundraising channels through a single platform
- To be able to manage donors by segment/tier
- To accompany the donor journey starting from the moment of expression of interest
- To improve monitoring, reporting and hence decision-making on fundraising initiatives and activities

2.2 Blood Transfusion Services

Each year, LRC receives 40,000 blood donations in its 13 Blood Transfusion Centers. LRC aims to increase this number to 80,000 blood donations per year. To achieve that, LRC needs to implement a new blood donor management system to recruit, mobilize and retain a database of 50,000 regular blood donors.

The blood donor management system will consist of the following components:

A. Website on which the social media users or other users will be routed to learn about being a blood donor, and fill a form to become a registered blood donor

B. e-Delphyne (by Hemasoft) blood transfusion services specialized software which contains the database of all actual blood donors and their medical information. e-Delphyne also captures the information of walk-in donors who come to BTS centers without registering as blood donors prior to that.
C. Call center, which is a group of operators who will call the potential/prospective or registered blood donors and propose appointments to donate blood in one of the 13 Blood Transfusion centers of LRC
D. Salesforce CRM

What is required from the CRM for blood donor management is the achievement of the following objectives:

1. Recruitment of blood donors:
    a. Generate leads for potential blood donors from other LRC databases (volunteers, financial donors…)
    b. Link to the blood donor form on the LRC website
    c. Organize campaigns to recruit blood donors through email, SMS or other channels
2. Manage blood donors
    a. Store blood donor contact information and history
    b. Provide segmented reports and analysis on blood donors using geographical or status (prospective/potential, registered, actual or inactive blood donor)
    c. Track feedback of donors including complaints and satisfaction surveys
    d. Allow donors to choose a set donation frequency per year (meaning donor prefers to donate once, twice, three times per year…)
    e. Send automated reminders to blood donors who have not donated for a specific duration of time
    f. Send automated reminders to blood donors who have booked an appointment
    g. Send automated thank you messages to blood donors who have donated
3. Call center management
    a. Integrate with existing call center computer telephony system (Cisco)
    b. Generate lists of donors that can be sent to operators who will then call these donors
    c. Balance the workload between operators
    d. Capture the outcome of each telephone call with a blood donor and synchronize outcome with e-Delphyne system
    e. Record all phone calls with blood donors

    f. Provide a simple blood donation appointment scheduling tool that synchronizes directly with e-Delphyne
    g. Measure and report on progress of telephone campaigns
    h. Measure and report on performance of operators
4. Provide a chatbot for potential donors to have answers to frequently asked questions or booking of appointments at any time and without any wait time

2.3 Volunteer Management

The LRC is a volunteer-based organization having around 5000 to 6000 active volunteers and a turnover of 1000 volunteers yearly. LRC needs visibility on its active volunteers and needs to be able to monitor and manage these volunteers, new recruits, and alumni, actively. Therefore, LRC needs a volunteer management database that can fulfill the below objectives:

1. Manage volunteer recruitment cycle
    a. Launch recruitment campaign (national or per center or groups of centers)
    b. Collect volunteer applications
    c. Manage recruitment campaigns (short list candidates, schedule interviews, etc.)
    d. Confirm accepted candidates
2. To accompany the volunteer journey from the moment of expression of interest until they become alumni
    a. Interested candidates can register their interest in volunteering
    b. All types of volunteers can manage their individual profiles, roles, and completed trainings
    c. Active volunteers can register their volunteering hours. LRC can track volunteering hours of individual volunteers
    d. LRC Alumni can register on the CRM and keep in touch to receive LRC news
3. Improve monitoring and reporting on volunteering issues
    a. To be able to manage volunteers by different groups
    b. To be able to view reports by different criteria related to status, tenure, activities, location, etc.

3. Use Cases

The below section is intended to provide additional details translating the objectives listed in section 2. as specific use-cases which the requested solution is expected to meet or exceed. Bidders should explain how their approach will address each use-case, and LRC's acceptance criteria and payment releases will be tied to the use-cases being satisfied.

3.1 Use cases for Fundraising

Use Case 1. Launching Campaign to Recruit Donors

LRC has conducted a social media campaign to recruit monthly donors. Sarah has clicked on the ad to donate, and the CRM captures the interest of Sarah and registers it on the CRM database as a potential lead.

Use Case 2. Tracking Donations Steps

A company has sent an email to LRC expressing interest in making a donation. The CRM officer in LRC enters the details of the company in the CRM database and updates at the stages listed below. The CRM is expected to provide a dashboard showing which company is at which stage, and allowing for easy follow-up:

- Intent to donate confirmed
- Donation made (Finance team is informed, transfer document is added to file)
- Donation received (Finance team flags)
- Receipt issued
- Donation confirmed to donor with letter of thanks
- Report issued to donor (if applicable)
- Newsletter sent to donor
- Subsequent emergency appeals sent to donor

Use Case 3. Donating Through the LRC Website

A company or group has visited the LRC website and has chosen to donate. They will be directed to fill a form indicating an interest to donate. This will be automatically entered on the CRM and the CRM will flag it to the relevant person in the Fundraising unit for follow-up. The steps of use-case 2 will then be followed.

Use Case 4. Receipt Notifications

Receipt was not issued for more than 10 days for a donation that was flagged as received. The system will alert both the Finance team and the Fundraising team for follow-up

Use Case 5. Combining Donor Information from Multiple Platforms

A person has donated to LRC through www.supportLRC.app, and another person through iRaiser. Both of these donations will appear on the fundraising dashboard and the user can see them combined or segmented by donation channel

Use Case 6. Mass Communication

After a disaster, more than 200,000 persons have donated to LRC through the supportLRC.app. LRC is trying to improve longer-term sustainability by recruiting and retaining monthly donors. Through the CRM, a mass-mail is sent to all donors who donated one-time through the app/website, encouraging them to become monthly donors. The CRM provides detailed analytics on the performance of this campaign.

Use Case 7. Identifying Drop-Outs

The dashboard indicates that a lot of monthly donors are dropping out. LRC decides to conduct a survey of donors to determine the causes. The CRM provides the ability to identify donors who have dropped out and to conduct a survey with them.

Use Case 8. Milestone Celebrations

John has donated to LRC 5 USD per month consistently and has now reached 1000 USD donated in total. The CRM will automatically send a pre-prepared message celebrating that achievement and indicating what this 1000 USD represents in terms of support (10 blood units for example). Same applies to birthdays.

Use Case 9. Branch Donations

Anne has donated to LRC's Antelias branch. When the report is sent, she can see the performance of this branch including how many persons this specific branch has supported in the past year.

Use Case 10. Donor Personal Profile

Anne has changed her address or phone number. She can enter into her donor profile and can update her personal details without any assistance from LRC, and without being a CRM user (therefore without LRC paying an additional fee for this user to be able to perform this action)

Use Case 11. Blood Donation

Robert has donated blood to the Lebanese Red Cross. He will automatically receive the LRC newsletter as he is a supporter, and will be offered the opportunity to become a monthly donor.

Use Case 12. Donor Complaints

Rana has donated to the LRC but is not pleased with the level of reporting from LRC. She will lodge a complaint by filling a form, and the complaint will be logged in the CRM which will provide a dashboard showing the number and type of received complaints, which are pending, which have been escalated, and which are resolved and closed.

Use Case 13. Wire Transfers

LRC receives a wire transfer donation. LRC Finance inputs the details of the transaction in the CRM and attaches a copy of the wire transfer. The CRM notifies the fundraising team who can follow up with the donor and issue a letter of thanks.

3.2 Use cases for Blood Donor Management

Use Case 1. Recruitment of blood donor through social media and website combination

The LRC launches a blood donor recruitment campaign through its social media channels. Persons who are interested in becoming blood donors click on the link, are routed to the dedicated website, and fill the blood donor form. Once they submit the form, their information is captured in the CRM database and they are categorized as registered blood donors.

Some of the registered blood donors use the LRC website to book a blood donation appointment. Once they do, this information is captured in the CRM and their status changes to reflect this booking. Once they donate, their status is updated to actual blood donor. Once they donate more than once, their status is updated to regular blood donor.

The CRM can then show on a dashboard the donors who are registered, and those who are registered and have booked an appointment, and those who have already donated once or more than once.

The CRM can then produce lists of donors who are only registered, and push those lists for a mailing campaign, SMS campaign, or telephony campaign.

Use Case 2. Recruitment of donors through mailing campaign

The CRM will produce a list of potential donors (volunteers, financial donors living in Lebanon, names collected on Excel lists and uploaded to the CRM as potential donors, donors who registered but never donated yet…), and conduct a mailing campaign.

The CRM will be able to report through a dashboard on whether the donor has received the email, read the email, clicked on a link to visit the relevant website, registered as a blood donor, booked an appointment, donated blood.

Use Case 3. Recruitment of blood donors through telephone campaign (call center)

The CRM will produce a list of potential donors (volunteers, financial donors living in Lebanon, names collected on Excel lists and uploaded to the CRM as potential donors, donors who registered but never donated yet…), and allow to forward those lists to call center operators while distributing the work-load among these operators.

The CRM will integrate with the telephony system of the LRC. The operators will initiate the call through the CRM, with full access to the profile and history of the person being called. The calls will be recorded via the CRM and the outcome of the call will be logged on the CRM:

- Person was not reached
- Person does not wish to be a blood donor - the relevant box will be ticked, and the person will be automatically removed from the CRM as a potential blood donor
- Person wishes to donate at a future date - the CRM will ask for the type of deferral. If deferral is for medical reasons, the medical reason will be entered and sent to e-Delphyne. If the deferral is non-medical, the relevant box will be ticked (vacation, busy…) and an automatic reminder will flag for call-back after the time period indicated by the person
- Person wishes to donate - the CRM will allow for booking of the appointment, and the appointment information will be sent to e-Delphyne

The CRM will be able to produce reports on the performance of each individual telephone operator and on the overall telephony campaign.

The same should be able to be done through a WHATSAPP integration.

Use Case 4. Recruitment of walk-in blood donor

A blood donor walks into an LRC Blood Transfusion Center (BTS) and donates blood. The information of the blood donor is captured via the e-Delphyne blood transfusion services software. The contact information (not the medical information) and the donation date, time and location are automatically uploaded to the CRM.

The donor is registered in the CRM as an active blood donor, for future follow-up to encourage the donor to become a regular blood donor.

Use Case 5. Follow-up of active blood donor

A blood donor has donated once in an LRC center last year but has not donated since. The donor is classified on the CRM as an active blood donor and a campaign is exported by the CRM to the call center for follow-up.

The operator calls the donor and after discussing with the active donor, is able to log the following information in a simple form:

- Call Outcome (similar to use case 3)
- Reason for not becoming a regular donor, tick boxes such as:
    - No time
    - Poor experience during donation
    - Distance is too far (CRM will automatically flag those cases for potential donations during blood drives in their geographical area)
    - Temporary medical condition
    - Definitive medical condition
    - Other - with field allowing to enter comments

CRM produces a report showing the conversion rate of active donors to regular donors, and the reasons for active donors not to become regular donors.

Use Case 6. Follow-up of active, regular donors

The CRM will automatically send reminders to registered active, regular donors. Three months after their last blood donation, donors will receive an email and/or SMS inviting them to book an appointment to donate blood again. The CRM will provide a dashboard showing the overview of all active, regular donors. The donation reminder can be adjusted according to preference of the donor (for example if donor prefers to donate twice per year).

If a blood donor does not respond and does not donate blood for more than 12 months, they will be categorized as inactive regular blood donors until they donate again.

The CRM will be able to export a list of such donors to the call center, for individualized follow-up, and the outcome of these calls will be logged as per previous use-cases.

Use Case 7. Donor retention

The CRM will send automated messages (email, Whatsapp, SMS) to blood donors thanking them on the following occasions:

- After each blood donation
- After 5, 10, 25, 50 and 100 blood donations to celebrate milestones
- On the birthday of the blood donor
- At year end, to tally up the year’s blood donations and provide an update on what LRC has achieved thanks to all the donors

The messages can be customized easily by the Lebanese Red Cross and can be linked to the social media channels of the donor in the form of badges.

Use Case 8. Donor complaints

The CRM will keep track of complaints made by donors through email, telephone calls, chatbot or other channels. The complaints will be trackable using a predefined list of complaint types as well as tracking of the status of the complaint.

The CRM will provide a workflow for the escalation and tracking of complaints and will allow their categorization by degree of severity

Use Case 9. Potential donors under the age limit

The LRC may collect names of people interested in donating blood, but who are under the age limit of 18 years. These names will be logged in the CRM in a specific sub-category of potential blood donors, and they will automatically be moved to the main list of potential blood donors once the persons reach 18 years of age.

Use Case 10. Invitation to blood drive

The LRC organizes blood drives on a regular basis in specific geographical areas. The LRC is planning on organizing a blood drive in Location X. The blood drive organizer will query a list of all actual blood donors, potential blood donors, and regular blood donors from the CRM who live in the designated area, and initiate a mailing or telephony campaign to inform these persons of the upcoming blood drive, and of the date, time and location of the drive.

Use Case 11. Donor deferral

When an active donor is taking an appointment to donate blood, he/she may provide information leading to deferral (meaning the donor cannot donate temporarily or definitively). The list of deferral reasons will be imported from e-Delphyne, with the deferral period (for how long the donor cannot donate). The operator will enter the relevant information, and the CRM will send this information to e-Delphyne

The donor should be "hidden" (meaning added to a temporary deferral list) for the period entered by the operator.

In case a donor is deferred following a visit to a BTS center. The technician will enter this information on e-Delphyne, which will then send it to the CRM and the donor will similarly be hidden for the deferral period.

All deferred donors should not appear on the telephone or mailing campaign lists.

Use Case 12. Recruitment of donors face to face

A youth volunteer is conducting an awareness session about blood donations with the students in a university. At the end of the session, the volunteer projects a QR code that links to a form that the students can scan from their phones and directly access a form to register as potential blood donors. The form and QR code are produced by the CRM and linked to this specific event (location, date). It is then accessible to conduct a follow-up campaign from the CRM.

3.3 Use cases for Volunteer Management

The volunteer management set-up at LRC comprises several levels and aspects that need to be managed depending on the type of activities implemented. The below table gives a brief overview and example of the structure of the different sectors and volunteers.

Volunteers can be divided into 4 categories based on status: Applicant, Active Volunteer, Reservist and Alumnus.

Volunteers can also have different roles and responsibilities which vary between sectors. Every volunteer can belong to multiple sectors or have multiple roles.

For example, in the EMS sector, each center has one or several of the below functions:

- First responder
- EMT
- Mission chief
- Ambulance Driver
- Team Leader
- Head of Station
- Local Volunteer Manager
- Etc.

LRC should be able to add, remove or amend roles.

National	National Volunteering Team					
Sector	EMS	Youth	BTS	DMU	MSS	DRR
District	7 Districts, each managing and having oversight on a number of stations	7 Districts, each managing and having oversight on a number of ceters	No district level	No district level	32 branches, each branch with 0 to 4 MSD centers	No district level
Center	50 Centers: each center including a different number of volunteers, all totalling around 4000 volunteers. Centers have different roles for volunteers such as: - Head of Station - Local Volunteer Manager - Technical Committee - …	34 Centers: each center including a different number of volunteers, all totalling around 2000 volunteers. Centers have different roles for volunteers such as: - Head of Center - Secretary - PR - Local Volunteer Manager - Driver - …	13 blood transfusion centers	14 DM centers	36 centers and 9 mobile units	No center level
Team	Each station is divided in to an average of 5 teams managed by a team leader and includes roles such as: - Team Leader - Ambulance Driver - Mission Chief - EMT - Dossart - ….	Each Center is divided in to teams managed by a Team Leader or Activity Leader responcible to plan and impelent an activty under the topic of the youth programs, and includes roles such as: - Activity Leader - Driver - Facilitator - GA Volunteer - Dossart - ….	No team level	TBD	No team level	16 teams
Branches	32 Local Branches have visibility of the number of active volunteers and alumni of the different stations within its area (can be under different sectors)					
	Each branch managed a small number of its own volunteers to manage with roles such as: - Administration - Fundraising - Communication - ….					

Volunteering Database

Use Case 1. LRC has a complete database providing visibility on all its volunteers

LRC can upload a database of all its volunteers. A CSV file can be imported with all its existing volunteering data into the CRM. New volunteers can fill their profile information directly on the CRM.

Use Case 2. Personal Profiles - Self-service

Anne is a volunteer at LRC. She has changed her contact information or needs to upload new documents. She is able to log in to her profile and adjust the needed changes. This functionality is provided at no, or minimal cost to LRC to prevent the yearly fees exploding due to the sheer number of volunteers.

Volunteer profiles include: contact information, copies of personal documents (e.g ID), sector(s), volunteering status, volunteering role, location, tenure, academic and employment data and other information.

The CRM provides full visibility of volunteering data according to assigned roles and privileges.

Use Case 3. Profile Update: Add Completed Trainings

Anne has undergone several trainings. She updates her profile to include the completed trainings, which are marked as "unconfirmed. The CRM sends an email notification of her new training data to the relevant training manager. The manager confirms the completion of the training. The CRM receives the confirmation and updates Anne’s profile, marking the relevant training as "certified"

Use Case 4. Alumni Registration

LRC wants to build its alumni database. The communications team conducts a social media campaign to encourage previous volunteers to register. Those who click on the link are routed to a form on the CRM, and the CRM will create a profile for each ex-volunteer.

The CRM will automatically remind registrants to fill in the fields that are marked by LRC as required.

The CRM will allow LRC to issue newsletters by email to the alumni, based on criteria such as: living in Lebanon or out of Lebanon

Recruitment of New Volunteers

Use Case 5. Applying to Recruitment Campaign

Anne is interested in joining the LRC. She sees an ongoing recruitment campaign on the website or through social media, clicks on the link, and is routed to fill an application through the CRM. Anne is able to apply to one (or multiple) of 93 different LRC volunteer centers, or to the LRC in general. The CRM captures Anne’s interests, categorizes her as a potential volunteer for the center(s) that she applied to and sends a notification of the received application to the local volunteer manager (LVM) (for specific location/campaign application) or to the national volunteering team (for general application).

Use Case 6. External Recruitment Campaign

The LVM (Local Volunteer Manager) of Gemmayze station has opened a new recruitment campaign for specific volunteer specialisations within LRC. They are able to view Anne’s application and manage the recruitment campaign through Salesforce. They are able to short list applicants and register their progress in the recruitment cycle and volunteering status (e.g. applicant, active volunteer, alumni).

For applicants who are rejected, the CRM will ask the LVM for a reason and will categorize the applicant accordingly: cannot join LRC, cannot join the sector, cannot join the center, rejected because maximum capacity of center is reached.

Once the campaign is over, applicants who are not selected remain in the CRM for future opportunities.

The CRM is able to show progress and analytics related to the campaign.

Use Case 7. Internal Recruitment Campaign

There is a need for recruitment for a volunteer role having previous LRC experience (internal recruitment). The LVM is able to open a new recruitment campaign and restrict applications to active volunteers or alumni only and also according to specific criteria (such as age, experience, training courses, tenure….) The CRM will send an internal notification of the campaign to existing volunteers or alumni who are eligible as per the basic criteria and requirements. The LVM continues to manage the recruitment campaign with the relevant list of applicants.

Managing Active Volunteers

Use Case 8. Managing Volunteering Hours

The LVM posts monthly the activities and shifts for the upcoming months. Anne can sign up for shifts based on her role and completed trainings. Her team leader approves and confirms her attendance on the CRM once complete. The CRM captures the completed hours of Anne.

The LVM can extract monthly time sheets per volunteer or by project or location from the CRM.

Use Case 9. Complaints

Anne has a complaint or feedback that she would like to provide. She is able to do that through the CRM and decide to which level she would like to raise it (local or national). The LVM (for local) or sector focal person (for national) will receive the posted message and reply back. The supervisor of the LVM will be able to have oversight on complaints and see a dashboard showing the number, severity and type of complaints as well as their status (received, pending, escalated, resolved…)

The CRM will keep track of complaints made by volunteers through email, telephone calls or other channels. The complaints will be trackable using the pre-defined list of complaint types as well as tracking of the status of the complaint.

The CRM will provide a workflow for the escalation and tracking of complaints and will allow their categorization by degree of severity

Use Case 10. Requesting Documents

Anne needs a document from LRC, such as a training certificate or letter of recommendation. She is able to send the request through CRM and/or her request is logged on the CRM. The sector focal person receives the request for processing. Anne receives a notification through the CRM once the document is ready. The supervisor or volunteer coordinator in the relevant department has oversight of the status of all requests.

Use Case 11. Help Section

Anne would like to refer to previous documents, resources, memos/processes, or contact information. She is able to access a help section on the CRM and view all the shared documents and information that she is authorized to see according to her role.

Use Case 12. Mass Communication

The LVM or sector focal person needs to send an email to volunteers or alumni. The CRM allows the sender to select the relevant group of volunteers by location, status, or other criteria and send the document to all. The CRM tracks the outcome of this mailing campaign.

Use Case 13. Search for Volunteers

LRC is in need of specific expertise for an activity. The CRM can facilitate a search among registered volunteers and extract lists based on occupation, academic profile or role.

Exiting Volunteering

Use Case 14. Exit

Anne decides to leave the LRC. She submits her resignation letter to the local volunteer manager. After her resignation is approved, the local volunteer manager changes her status to alumni and uploads her resignation letter. The CRM sends a notification to the National Volunteer Management (NVM) team of the Anne's exiting status and are able to call her for an exit interview. The NVM can assign the exit interview process to a specific member and can track the progress and update the status of the exit interview on the CRM based on the results of call:

- No response
- Not willing to participate in an interview
- Willing to participate in an interview
    - Interview status:
        - Scheduled appointment
        - Postponed (new appointment)
        - Completed
- Cancelled: specify reason

When the volunteer is willing to participate, the NVM can post the results of the interview on Anne's profile. The CRM restricts access to all exit interview results to the NVM only.

The CRM can provide a dashboard to the NVM of the consolidated results of the interviews by response rate, sector, station, exiting year, tenure, etc.

Management & Oversight

Use Case 15. Dashboards & Reporting

The LVM or sector focal person is able to view, manage and issue reports related to volunteers based on different criteria (status, tenure, location, number of hours, roles…)

The CRM allows the export of the needed data into CSV files.

4. Features

- Integration with LRC website www.redcross.org.lb
- Integration with LRC fundraising websites/app (both iRaiser and supportLRC.app
- Integration with LRC social media tools (Facebook, Twitter, YouTube, Instagram, LinkedIn) - marketing integration to measure effectiveness of donor acquisition campaigns via social media
- Integration with Whatsapp for Business to be able to send Whatsapp messages to blood donors.
- Integration with blood transfusion donor system e-Delphyne (by Hemasoft)
- Integration with telephony system for blood donor management
- Integration with first-aid training database
- Business intelligence: ability to generate reports by channel, by segment, and by status of donor (lead, interest, confirmed, monthly, major donor…) / for volunteers (by sector, center, status, …)
- Data confidentiality: LRC able to assign roles about who can see which data, and access to CRM data is fully logged
- Data backup: all LRC data on CRM is regularly backed-up on the cloud and on physical hard drives
- Ability to send and track mass-emails to donors
- Ability to send surveys to donors
- Ability to manually switch off the integration with app if needed (example of Beirut Blast when system needed to be sped up)
- Ability to manually import and export CSV files into and from the CRM database
- Badges and loyalty programs that can be visible/seen on social media (both for individuals and corporates?)
- Optimization for mobile
- Data protection

- Ability to upload and share documents and resources

6. Deliverables

The implementation partner is requested to provide the following scope of work:

- Provide a solution that meets the objectives listed in section 2
- Provide a solution that answers to all use cases listed in section 3
- Provide a solution that contains the features listed in section 4
- Solutions provided should take long term cost efficiency and special user needs into account
- Work with LRC stakeholders to design the CRM dashboard and reports
- Support the migration and cleaning (de-duplication) of LRC's current database of donors to the CRM (160,000 donors)
- Provide support for a period of 24 months after completion of scope of work
- Provide handover manual and in-depth training to 2 LRC staff on the use of each of the CRM modules and 2 superusers.

Bid application documents

Interested bidders should provide the following documents within their proposal:

- A full proposal package including:
  - Proposed solutions meeting all LRC's requirement detailed above
  - Proposed methodology of implementation and change management guidelines
  - Timeline for implementation showing clearly the expected progress of each module of the CRM in addition to overall for the full project
  - Letters of recommendation from similar/comparable non-profit organisations
  - Company profile and portfolio description showing prior experience in similar projects and including partner status with Salesforce.org partner program
- Clear description of resources to be allocated to the project including:
  - CVs of appointed persons
  - Roles and responsibilities of appointed persons
  - Time that will be allocated by each role
- A full financial proposal including:
  - Cost of implementation with detailed breakdown
  - Cost of support with detailed breakdown
  - Salesforce licensing fees should be mentioned related to each module and roles
  - Any discounts for non-profits should be clearly mentioned

- Payment terms should be clearly mentioned including method of payment and linked to the implementation progress

7. Bid selection criteria

LRC will only select bids meeting or exceeding the following criteria:

- More than 5 years of experience working with Salesforce CRM
- Has implemented similar, documented implementations for at least 3 other non-profit organizations in the last 3 years.
- Provides CV of technical and project staff that will be assigned to this project and have personal experience with implementing similar projects with non-profits

Additional criteria for selection include:

- Completeness and clarity of proposal
- Company portfolio
- CVs of staff that are assigned to this project
- Letters of recommendation from similar/comparable non-profit organizations
- Financial proposal
- Timeline for implementation

8. Bid submission

RFP Deadline: All sealed bids must be delivered to the LRC to be stamped “received” no later than 2:00pm on Monday 12 July 2021, at the following address:

Lebanese Red Cross – Headquarters – Finance Department

Kontari Street, Spears

Beirut, Lebanon

Attn: Salesforce implementation

Bids shall contain two (2) printed copies and one (1) digital (PDF) copy on a thumb drive and must be in a sealed envelope clearly marked “Attn: LRC Salesforce implementation”

Intent to Bid: If your company plans to submit a bid, please send an email by 2:00 pm on the Tuesday 22 June 2021 to Mohamad.elhaj@redcross.org.lb

Agencies can submit written questions or requests for clarification to LRC by the email to mohamad.elhaj@redcross.org.lb. All questions including all replies will be sent back to all bidders.

Responses to questions, interpretations, or clarifications concerning this RFP will be sent by email to all bidder to ensure equal awareness of important facts and details. Questions will not be considered unless submitted in writing as directed. Bidders are not allowed to contact any person in LRC by phone or face to face. Any attempt to communicate with LRC during the bidding process outside of the provisions allowed within this RFP document will be considered an attempt at fraud and will automatically eliminate the relevant bidder from consideration.

By submitting a bid to the LRC in response to this solicitation, the bidder waives any right to seek damages or recompense of any kind or nature relating to or arising out of release of any document, communication, record or information provided to the LRC in connection with this solicitation and consents to the release of such documents, communications, records or information as the LRC may deem appropriate in its sole discretion.

The LRC reserves the right to terminate this solicitation prior to entering into any agreement with any qualified firm pursuant to this Request for Proposal, and by responding hereto, no firms are vested with any rights in any way whatsoever. The LRC reserves the right to reject any or all bids for not complying with the terms of the request for proposal. The LRC also reserves the right to negotiate with the selected bidder in the event that the lowest responsive and responsible bid price exceeds available funds. Any bid may be withdrawn prior to the above scheduled time for the opening of bids or authorized postponement thereof. Any bid received after the time and date specified shall not be considered.