

11 September 2020

Request for Proposal and Quotation: Customer Relationship Management System - Action Aid UK

INSTRUCTIONS TO BIDDERS

Request for Proposal Pack

The RFP pack for this Service is comprised of:

1. These Instructions to Bidders
2. Terms of Tendering
3. The Request for Proposal, outline service requirements
4. ActionAid UK Standard Supplier Contract Terms
5. New Supplier Pre-Qualification Questionnaire

Introduction to ActionAid UK

ActionAid is a leading international charity working in over 45 countries. We work with the poorest women and girls in the world, changing their lives for good.

ActionAid UK (AAUK) raises money to support ActionAid's programme work to transform communities; we influence policy to change the systems and structures that keep people poor; we carry out research and put pressure on governments and key decision makers to effect global change.

Further details can be found on our website: www.actionaid.org.uk

Background to Services

ActionAid UK is the largest funder of the ActionAid Federation, and as such plays a key role in the federation's global fundraising. ActionAid UK is dependent on systems and technology to deliver the key strategic objectives and the implementation partner will play a key role in supporting our ambitions laid out in our 5-year strategy "[Together, with women and girls](#)".

We are currently running two supporter databases; a bespoke Oracle based system called Infobase, that has been developed in-house over the last 22 years, and Raiser's Edge, used for relationship management by our Major Donor, Trusts and Corporate teams in our Partnerships & Philanthropy (P&P) department.

We have committed to a new CRM Programme to integrate our disparate systems and to ensure that we have robust Customer Relationship Management (CRM) and Business Intelligence (BI) systems and tools in place. This will allow us to be flexible, innovative, provide exceptional supporter experience, relationship management and provide insight from our data to ensure that we are evidence led and using this to drive our fundraising and marketing programmes.

Our ActionAid UK Strategy 2018 – 2022 and The Resource Mobilisation Strategy commits to embedding a 'Digital First' culture into all voluntary fundraising activities. In order to achieve this, we must invest and update our CRM and BI systems and tools. This programme is laying the groundwork for growth to enable this to happen in the next strategy period.

Evaluation Process and Award Criteria

Pre-Qualification: All bidders must first pass minimum standards of financial viability, probity, and legal compliance. This will be assessed based on independent credit checks, sanctions screening, and information provided in the New Supplier Pre-Qualification Questionnaire (PQQ) which must be returned together with proposals. We may request evidence of any information set out in the PQQ document and reserve the right to reject any proposals where evidence cannot be provided.

The following requirements are expected of any bidder:

Please refer to Appendix B of the attached documents to the RFP, entitled “ActionAid UK CRM Requirements.”

Evaluation Methodology:

Evaluation and selection of vendors to provide products and services as defined in this RFP to ActionAid UK will be based on the following criteria, which are given in no specific order.

- Likely overall financial cost to the organisation (taking into account both the initial costs and any recurring/annually payable charge; also to include licences, development and implementation, support, training)
- Fit of implementing partner with the organisation, including understanding of the ActionAid UK’s culture and work, and ability to challenge and improve the organisation’s processes.
- Predictability of the timescales for implementation (i.e. that the systems are implemented within the timescale predicted at the outset)
- Expertise of proposed team
- Proposed ways of working and support terms
- Robustness of project systems and processes in place
- Depth of overall experience of supplier
- Company history and stability
- References provided
- Timely and complete response to RFP
- Information as provided by supplier or as available through other sources
- Quality assurance offered
- Relevance and quality of functionality offered by the systems and their ability to meet the organisation’s business requirements, including, but not limited to:
 - Ease of use for staff
 - General configurability (screen forms, data structures, workflow support, etc.)
 - Ease of producing reports and interrogating the data (i.e. different staff can produce the reports and queries quickly and easily)
 - Ease of data sharing and ease of extraction of the data, i.e. for analysis purposes
 - Futureproofing of the system to support new initiatives in the future

The CRM RFP review panel reserves the right to accept or reject any or all RFPs received.

Shortlisting and Interviews

Bidders who are able to meet ALL our Requirements will be invited to interview with a panel of ActionAid stakeholders. The purpose of the interview will be to demonstrate and answer any questions in relation to the proposed services and address any concerns which the panel may have arising from the proposals.

In the event that more than three bidders are able to meet all our Requirements, we reserve the right to invite no more than the three highest scoring suppliers to interview. We may invite less than three suppliers if the difference in scores is considerable; this is to avoid wasting the time of suppliers who are highly unlikely to be successful irrespective of the outcome of an interview.

After interviews, the initial proposal scores will be re-visited and adjusted in light of relevant information received at interview.

Contract

The Prototype/Discovery contract will be for a period of 2 months; the Implementation Contract is anticipated to run for a period of 12 months. Any contract awarded will be on a non-exclusive basis. A copy of AAUK's standard supplier contract terms is attached.

Timetable

The key indicative dates for this tender process are set out below. AAUK reserves the right to modify this timetable at any time. Any changes to the timetable will be communicated to all bidders who have expressed an interest in delivering the Services

RFP stage through to selection of preferred supplier:

Process step	Date
Request for Proposal (RFP) distributed	16.9.20
Suppliers confirm receipt of RFP and indicate whether likely to respond	21.9.20
Adapta on behalf of ActionAid UK gathers and collates any supplier queries; ActionAid UK provides responses	17.9.20 to 6.10.20
Suppliers submit completed responses to RFP	7.10.20
ActionAid UK reviews responses and selects a short-list of suppliers to invite for presentations	19.10.20
Suppliers present overview of their proposed solutions (based on scenarios to be provided by ActionAid UK)	4.11.20
ActionAid UK follows up with suppliers as needed with any further questions	5.11.20 to 9.11.20
ActionAid UK agrees preferred supplier and solution	10.11.20

Due diligence/implementation preparation stage:

Process step	Date
Taking up references for preferred supplier	By 30.11.20
Financial/company checks	By 17.11.20
Preferred supplier works with ActionAid UK staff to develop prototype (under short-term contract)	17.11.20 to 27.11.20
Prototyping sessions delivered	w/c 30.11.20
Discovery activity (detailed scoping/system configuration analysis resulting in refined proposal and full implementation plan) – to be carried out as commissioned work/first step in implementation but without obligation for ActionAid UK to proceed further	Completed by 30.01.20
Contract negotiation (for full implementation)	Completed by 12.02.20

Suppliers are kindly asked to confirm receipt of this RFP at their earliest opportunity and in any event no later than 5.00pm on 18.9.20, together with an indication as to whether they are likely to submit a response as an Expression of Interest (more on this, below).

Please also be aware in particular of the date for presentations, shown in bold. Suppliers are kindly asked to keep the presentations date clear in anticipation of being shortlisted.

Notes on RFP stage

Following evaluation of the responses to this RFP, ActionAid UK will invite short-listed suppliers to give a short presentation of their company and a demonstration of their software solution (based on a set of scenarios/stories to be provided by ActionAid UK), and to discuss their proposed approach to meeting ActionAid UK's requirements. The meetings will be held virtually using Microsoft Teams or equivalent.

There may be queries arising from the presentations, in which case ActionAid UK will follow up with suppliers as appropriate. A preferred supplier will then shortly be confirmed by the CRM Steering Group.

Notes on Due diligence/implementation preparation stage

Once the preferred supplier has been appointed, a due diligence/implementation preparation stage will commence. Due diligence will be carried out by both ActionAid UK and the supplier. The due diligence will involve, among other activities, the preferred supplier preparing for a prototyping session in which the proposed system will be configured to show in greater detail how a select/agreed number of business processes might be carried out in practice. The preferred supplier will have access to relevant ActionAid UK staff while developing the prototype (which will be limited in scope to agreed processes only) and hence will be asked to allocate members of their proposed implementation team to spend time with staff in order to explore and understand the processes involved. The purpose of the prototyping is to provide ActionAid UK with further assurance, as part of its due diligence, that the choice of supplier and solution is correct for its needs.

Customer references and company checks will also be carried out during the due diligence period, potentially including virtual meetings with reference sites (organisations of a similar size/nature to ActionAid UK), running systems similar to those proposed.

Additionally, the supplier will be commissioned (as a costed activity) to carry out a detailed 'discovery activity' which will involve detailed scoping and analysis, as one of the first activities of the implementation itself. The discovery activity will also enable the supplier to refine, if required and within reason (for subsequent agreement and negotiation with ActionAid UK), any costings previously provided in the RFP response, so as to at this point provide a fixed price for the solution (subject to any assumptions which may apply). This final step will be carried out in parallel with negotiation of the contract for the full implementation.

Please note that ActionAid UK may, at its sole discretion, decide at any time during the due diligence stage to not proceed further with the preferred supplier and/or solution.

Any queries about technical aspects or the specific technical requirements should be directed as follows:

During the week commencing 14.9.20	Email: Libby@adaptaconsulting.co.uk Phone: 07866 621323
From 21.9.20 onwards	Email: Amanda@adaptaconsulting.co.uk Phone: 07548 515291

Submitting your Proposal

Bidders should complete and return a copy of the New Supplier Pre-Qualification Questionnaire and completed proposal in response to the RFP to the PoC by the Deadline for Proposal Submissions.

Proposals should be clearly marked as: **Request for Proposal and Quotation: Customer Relationship Management System - Action Aid UK**

Proposals will be accepted before the Deadline, but no Proposal will be considered if received after the Deadline unless there is evidence that the Proposal was delivered (such as email delivery or read receipt) or other extenuating circumstances, which it shall be at AAUK's absolute discretion to reject.

Point of Contact (PoC), Expressions of Interest, and RFP Process Queries

The point of contact (PoC) for this tender process shall be:

[Katherine Griffis, Contracts and Procurement Manager](#)

The PoC can be contacted at the following email address:

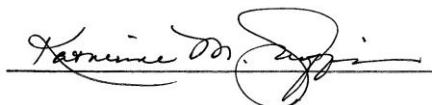
commercialuk@actionaid.org

Please submit expressions of interest (Eoi) to the PoC. Submitting an Eoi will ensure that we are able to notify you of any changes to these documents, the process, or our Requirements.

In addition, any queries related to this process and our Requirements should be addressed to the PoC. The deadline for the receipt of any clarification questions is Thursday 1 October 2020.

We look forward to hearing from you.

Best wishes,



Katherine Griffis
Contracts and Procurement Manager