

Request for Proposal

Salesforce expertise and support

Dated: September 1, 2023

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1. DNDi Overview

Neglected tropical diseases continue to cause significant morbidity and mortality in the developing world. Yet, of the 1,556 new drugs approved between 1975 and 2004, only 21 (1.3%) were specifically developed for tropical diseases and tuberculosis, even though these diseases account for 11.4% of the global disease burden.

Founded in 2003 to address the needs of patients with the most neglected diseases, DNDi is a collaborative, patient's needs driven, not for profit drug R&D organization.

Acting in the public interest, DNDi bridges existing R&D gaps in essential drugs for these diseases by initiating and coordinating drug R&D projects in collaboration with the international research community, the public sector, the pharmaceutical industry, and other relevant partners.

DNDi's primary focus has been the development of drugs for the most neglected diseases, such as Human African Trypanosomiasis (HAT, or sleeping sickness), visceral leishmaniasis (kala-azar), and Chagas disease, while considering engagement in R&D projects for other neglected diseases to address unmet needs that others are unable or unwilling to address.

The primary objective of DNDi is to deliver 16 to 18 new treatments by 2023 for leishmaniasis, sleeping sickness, Chagas disease, malaria, pediatric HIV, filarial diseases, mycetoma and hepatitis C, and to establish a strong R&D portfolio that addresses patient needs. Expanding upon R&D networks built on South-South and North-South collaborations, DNDi aims to bring medical innovation to neglected patients by developing field-adapted treatments.

In doing this, DNDi has two further objectives:

- Use and strengthen existing capacities in disease-endemic countries via project implementation.
- Raise awareness about the need to develop new drugs for neglected diseases and advocate for increased public responsibility.

Since the start of the COVID-19 pandemic DNDi has engaged a rapid response, coordinating a major clinical trial initiative in Africa, Asia and South America (ANTICOV) as well as engaging in major repurposing and novel anti-viral discovery approaches.

For more information, please visit DNDi website: <http://www.dndi.org/>

2. Purpose

The stakeholder Relationship Management system is considered a key asset to our organization with the highest level of support and sponsorship. We have progressively released applications supporting different functional groups in Salesforce to gain traction and adoption within the organization (i.e., over the past years, we have digitalized most of our back-office processes). We have set up a governance body - with representatives of the different business units using Salesforce to review and prioritize the demands.

In the last year, we have migrated our solution from the commercial version of Salesforce to the Non-Profit Success Pack (NPSP) to cope with our fundraising challenges.

We aim to accelerate the adoption of Salesforce by delivering team specific trainings and to add new functionalities. We are therefore seeking a company able to assist us in these activities and provide high-level expertise in this critical phase of our expansion. We also expect the supplier to provide 1st, 2nd and 3rd level of support to our internal Sysadmin. A good understanding of private, public fundraising is a key aspect of this future partnership.

2.1. Key figures

Accounts	8600
Leads	23500
Contacts	12500
Contracts	3750
Reports	100
Active Users	243
Licenses	116 Salesforce Licenses, 151 Chatter Only licenses

2.2. Current salesforce implementation

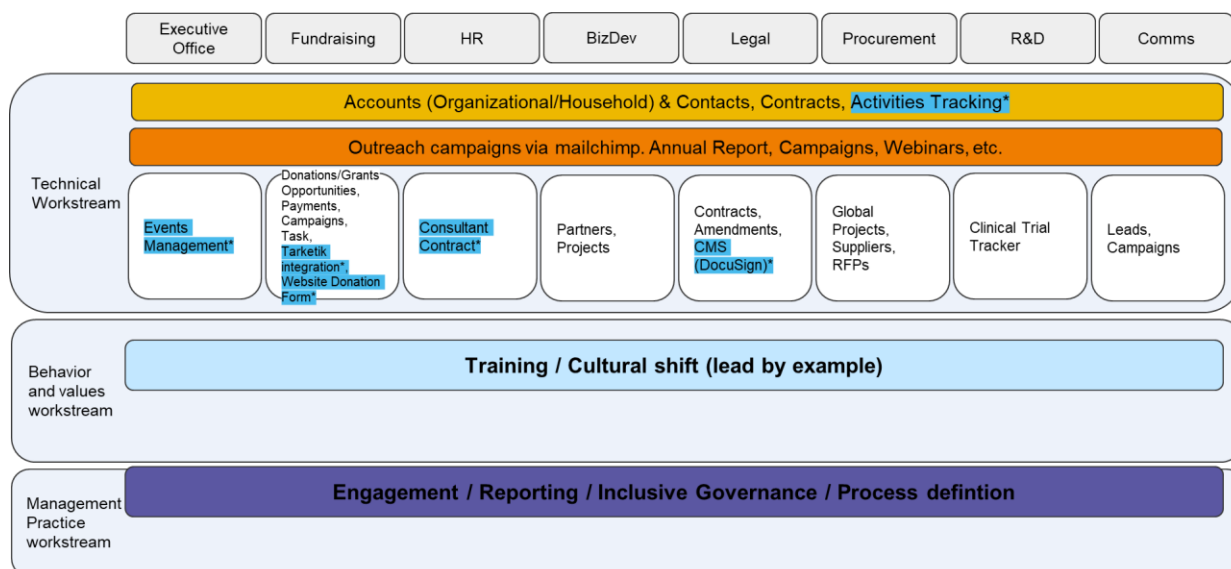
Our Customer Relationship Management system (CRM) is the organizational source of information for the following objects:

- Our leads, accounts, contacts, and related documents of our main partners and suppliers from all departments of the organization.

- Activities related to the above-mentioned contacts, donations, contracts, relationships relevant to the following teams: Fundraising, Procurement, Business Development, Communication, Legal Affairs.

These objects are accessible through Apps that we currently support for our business users:

- Donor relationship Management (External Affairs) private and public fundraising:
 - From donor creation to reception of grants.
 - Donor requirements tracking.
 - DNDi's online donation platforms US and Europe (online donations, manual entry, recurring donations).
- Contract Lifecycle Management (Legal Affairs):
 - Final document storage with key contractual information.
- Partnership and vendors management system (Business Development):
- Alliance management module, including multi parties relationship contracts, from the creation of partners/suppliers to full contract execution and follow-up.
 - Business Development.
 - Procurement, support of bid defense documentation.
- Clinical Trial Tracker (R&D):
 - Repository for DNDi clinical trial information and relation to funders, teams and suppliers or partners.
- Management of consultants:
 - Consultant database to track their contracts and financial information.
- Communication-related activities.
Our communication teams rely on various third-party software integrated into SF:
 - Mass mailing integration.
 - Zoom integration for webcasts.



*Future functionalities highlighted in blue

DNDi Salesforce Service catalog.

The list of modules installed is available in the Appendix 4.3

2.3. Expected deliverables

This Request for Proposal (RFP) consists of two primary tasks that DNDi requires the chosen vendor to undertake. The initial task involves providing support and maintenance for the existing platform, while the second task involves delivering new functionalities or adapting existing ones.

Activity 1: Support and maintenance (RUN)

We expect expertise from the selected supplier in the following area to help our Sysadmin deliver customizations and services.

- Salesforce 1st level of support:
 - Responding to User Inquiries.
 - Incident Management.
 - User Access and Configuration.
- Salesforce 2nd level of support encompasses:
 - Incl. Creation/Deletion/Update of automation.
 - Various configurations, customization.
- Salesforce 3rd level support:
 - Provide expertise on SFDC architecture and objects that best meet DNDi's requirements, advise on apps to integrate and serve DNDi's (out of the shelves).

- Provide support and expertise in our process of continuous improvement of our SRM tool.
- Salesforce training:
 - Deliver basic training to new employees.
 - Deliver process based trainings to the different teams.

Package 2: Update existing or develop new functionalities (BUILD)

- Sound expertise in non for profits business processes to design our desired target solution is mandatory. We wish to work with very seasoned consultants on this topic, with proven experience in fundraising.
- DNDi will need to redesign its donation functionality to make it more robust.
- In the foreseeable future, we also expect to implement the following solutions:
 - Event management.
 - Activity tracking.
 - Procure to pay process.
 - Marketing automation and audience segmentation.
 - Artificial intelligence.
- We expect expert advice on SRM global integration:
 - Analyze and make recommendations (propose a roadmap) on the best solutions to invest in long-term solutions for Enterprise wise integration of various critical systems (ERP, BI, BPM, Middleware, HRIS).
- Additional requests may fall into the scope of this project, upon the needs of the organization (advisory services or expert advice, etc.).

- The current workload, which should remain identical, is between 16 and 20 hours a week.
- We have a preference for vendors that offer nearshore or offshore services.

3. RFP Instructions

3.1. General Information

- a. DNDi invites you as a Service Provider to submit a proposal in regards of this RFP Salesforce expertise and support as described above
- b. This entire RFP and all the related discussions, meetings, information exchanges and subsequent negotiations that may occur are subject to the confidentiality terms and conditions of the Intent to Participate attached as Annex 1.
- c. All bidders are required to complete and send in return the Intent to Participate letter signed.
- d. The issuance of this current Request for Proposal in no way commits DNDi to make an award. DNDi is under no obligation to justify the reasons of its service provider's choice following the competitive bidding. DNDi could choose not to justify its business decision to the participants of the RFP.
- e. DNDi reserves the right to:
 - Reject any proposal without any obligation or liability to the potential service provider.
 - Withdraw this RFP at any time before or after the submission of bids without any advance notice, explanation or reasons.
 - Modify the evaluation procedure described in this RFP.
 - Accept other proposal than the lowest one.
 - Award a contract based on initial proposals received without discussions for best and final offers.
 - Award all services to only one supplier or allocate them to different suppliers according to what DNDi will consider necessary.
- f. Late submission of proposals is subject to rejection.
- g. DNDi reserves the right to request additional data, information, discussions or presentations to support the proposal. All bidders must be available to discuss about details of their proposal during the RFP process.
- h. All offers should be submitted in an electronic format and in English.
- i. A proposed time plan set out below indicates the process DNDi intends to follow. If there are changes to these timelines, DNDi will notify you in writing.

3.2. Timeline

Process steps	Responsible party	Timelines
RFP launch	DNDi	September 4th, 2023
Intent to participate + Q&A sent to DNDi	Service Provider	September 13th, 2023
DNDi responses to Q&A	DNDi	September 27th, 2023
Reception of proposals	Service Provider	October 6th, 2023
Bid defense	DNDi / Service Provider	Between October 9th and October 20th, 2023
Due Diligence (finalists)	DNDi / Service Provider	November 3rd, 2023
Supplier selection	DNDi	November 21st, 2023

3.3. RFP Processes and contact information

3.3.1. Instructions

All bidders may request further clarifications in regards of this current RFP, by addressing questions in writing to the dedicated key contacts identified below in English. These questions should be submitted to DNDi at the date mentioned in the section 3.2. of the RFP.

In order to keep a fair bidding process, all the questions will only be answered in a document shared with all the bidders on the date indicated in section 3.2 of the RFP.

To submit your questions, please use the form attached as Annex 2.

3.3.2. Confirmation of intent

Please transmit your intent to participate by using and signing the document attached in Annex 1.

Each bidder is required to provide DNDi with a written confirmation of intent or decline to participate by the date as indicated in the section 3.2.

Please, note that the "intent to participate letter" is a standard document which DNDi cannot afford negotiating due to project priorities, time and resources dedication. This template is based on several years of experience working with suppliers and contains widely acceptable terms in RFPs.

Confirmations of intent should be sent by email to Bruno Discini (contacts details below).

Please kindly send any questions to contacts below.

Questions types	Contact person	Title	Contact information
Procurement	Bruno Discini	Procurement Manager	Email: bdiscini@dndi.org
IT	Olivier Thomas	Senior IST Manager	Email: othomas@dndi.org

3.4. Format and content of the proposal

Responses to this RFP must be in English and should contain the following information:

- **A cover letter including:**
 - Name and address of the service provider.
 - Name, title, phone number and email address of the person authorized to commit contractually the service provider.
 - Name, title, phone number and email address of the person to be contacted in regards of the content of the proposal, if different from above.
 - Signature of this letter done by a duly authorized representative of the company.
 - Acceptance of the consultation principles as detailed in section 3.1.
- **Competencies**
 - Detailed number of consultants having expertise in Salesforce (certification) per country.
 - CVs of consultants.
 - Interviews will take place during the bid defense phase.
- **A financial proposal**
 - Daily rate card for different profiles.
- **Administrative information**
 - Business Company information: directors and officers, creation date, corporate headquarters, locations, business turnover of the past 3 years (global and in the field of service provided), headcounts (global and in the field of service provided), general services provided, customer's reference, pricing strategy for NGO.
 - Any other relevant information enabling DNDi to assess the opportunity of contracting with your company.

3.5. Conflict of Interest

The Company shall disclose any actual or potential conflicts of interest in the Intent to Participate letter.

3.5.1. Criteria for selecting service providers

The decision to award any contract as a result of this RFP process will be based on Service Providers' responses and any subsequent negotiations or discussions. The decision-making process will consider the ability of each service provider to fulfil DNDi's requirements as outlined within this RFP and the cost of the offer.

Proposals will be assessed against the main following criteria but not limited to:

3.5.2. Technical criteria

- Experiences/skills, level of company representatives assigned to this project.
- Quality and applicability of proposal presentation.
- Customer references.
- Data privacy protection measures in place in accordance with EU regulations.

3.5.3. Capacity to deliver

- Project management and business analysis capabilities.
- Experience with similar work.
- Profile of staff involved.

3.5.4. Financial criteria

- Realistic costing of the proposal with NGO rates when possible.
- All activities listed above to be quoted with detailed costing provided.

4. Annexes

4.1. Annex 1: Letter of intent

4.2. Annex 2: Q&A Form

4.3. Annex 3: List of modules installed

Package Name	Publisher	Version Number	Namespace Prefix
Data Quality Analysis	Salesforce Labs	1	
No Duplicates	At home	1.18.5	noduplicates
Draggin Role	Qandor	1.11	DrivEnable
Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps
Salesforce Mobile Apps	Salesforce.com	1.2	sf_chttr_apps
Zoom	Zoom Video Communications, Inc.	3.13.1	zoom_app
SFDO Base	Salesforce.org	1	sfdobase
SalesforceA Connected Apps	SalesforceA Connected Apps	1.1	sfadminapps
Loom	Loom	1.3004	loom
Guest User Access Report	Salesforce	3.13	guar
Salesforce.com CRM Dashboards	salesforce.com	1	
DocuSign Apps Launcher	DocuSign	4.1	dfsle
Magic Mover for Notes and Attachments	Salesforce	4.15	LEXMAGICMOVER
Program Management Module	Salesforce.org	1.32	pmdm
Scan_to_Salesforce	Sansan, Inc.	1.52	sansancard
Contacts & Organizations	Salesforce.org	3.22	npe01
Recurring Donations	Salesforce.org	3.25	npe03
Households	Salesforce.org	3.18	npo02
Affiliations	Salesforce.org	3.13	npe5
Relationships	Salesforce.org	3.15	npe4
ActionHub	VersatileCapitalist, Inc	3.3	MassManager
SN for SFDC	LinkedIn	1.5.4	LID
Payments2Us	AAkonsult Pty Ltd	9.3.1	AAkPay
Field Trip	RingLead	1.4	Field_Trip
Events for Salesforce	Events App Force.com Labs	4.12	
AAkonsult Campaign Status	AAKonsult Campaign Status	1.8	AAKCS
Nonprofit Success Pack	Salesforce.org	3.225	npssp
AdvancedSearch	Starfish Enterprise, LLC	1	advsearch
Duplicate Check for Salesforce1	Plauti B.V.	3.344.1	dupcheck