



SCOPE OF SERVICES
Small Purchase
Customer Relationship Management (CRM) Design and Configuration
Community Development Block Grant – Disaster Recovery
Foundation for Puerto Rico
2022-SP-22

1. Introduction and Overview

This document defines the work that the Supplier must perform in providing **Customer Relationship Management (CRM) Design and Configuration** services under a contract with Foundation for Puerto Rico (FPR) for the Whole Community Resilience Planning Program (WCRP), included in the Puerto Rico Department of Housing's (PRDOH) Action Plan approved by the U.S. Department of Housing and Urban Development (HUD). A complete copy of the Action Plan, as amended, is available at <https://www.cdbg-dr.pr.gov/en/action-plan/>.

FPR is seeking professional services to design and configure customer relationship management (CRM) program and case management features using FPR's exiting Salesforce Nonprofit Success Pack (NPSP) platform and Project Management Module (PMM). The configured module will be tailored specifically for the WCRP Program's needs and should permit program participant case management, data gathering, reporting and analysis functions in compliance with FPR's subrecipient agreement with PRDOH. The module will be used by Program staff to input data, track participant progress, and oversee the services provided through direct technical assistance and capacity building sessions. It will also be used to produce relevant reports from key performance indicators and metrics.

The WCRP Program will use Community Development Block Grant – Disaster Recovery (CDBG-DR) funds to enable municipalities and non-profits to develop comprehensive Community Resilience Plans (CRPs) through a participatory planning process with and for vulnerable communities that will allow them to determine their needs, identify solutions, and develop projects, programs, and policies necessary to increase their resilience. As a subrecipient to the WCRP Program, FPR will provide ongoing and as-needed technical assistance to WCRP awarded applicants and communities (Program participants), and to PRDOH, to achieve the goals of the Program using its planning, education and data tools. FPR will monitor, evaluate, and facilitate the progress of Program participant's planning activities through individualized case management, direct technical assistance, and other capacity building methods.

If selected, the Supplier will be directly responsible for ensuring the accuracy, timeliness, and completion of all services assigned. The scope of work presented is based upon circumstances existing at the time of solicitation. There is no guarantee of a minimum level of services which may be requested by FPR under a contract.

FPR reserves the right, without limitations, to: (i) cancel this solicitation and reissue the Small Purchase or another version of it, if it deems that doing so is in the Public's best interest; (ii) award this Small Purchase to one or more qualified suppliers and (iii) amend the contract(s) of the Selected Supplier(s) to, among other, extend its original duration, modify the services or tasks listed, reduce the scale of its scope as a consequence of underperformance or inexcusable delays related to the services requested herein and, if appropriate, add additional tasks during the term of the contract.

FPR will review proposed prices received within the submission term and will verify the compliance of the submitted proposal with the requirements established in the scope of services. FPR may request clarifications to provide a better understanding of the purchase requirements. FPR reserves the right to negotiate proposal(s) received within the established submission term for this Small Purchase.

2. Background

The main objective of the Whole Community Resilience Planning Program is to develop comprehensive Community Resilience Plans (CRPs) with and for vulnerable communities that will allow communities to determine their needs, identify solutions, and develop projects, programs, and policies necessary to increase their resilience. The number of Program participants tasked with the development of these CRPs are approximately twenty (20) non-profit organizations or local Municipalities, and 100 communities.

The WCRP Program will be supported by FPR through a Technical Assistance (TA) component for participating entities, communities and to PRDOH. The exact nature of the TA will be determined in part by FPR, participating entities, and communities, with the approval of PRDOH. However, in general terms, FPR will evaluate and facilitate progress of Program participant's planning activities through individualized case management, technical assistance and capacity building methods.

Per FPR's current subrecipient agreement with PRDOH, our TA responsibilities include:

1. Monitor and evaluate the progress of the Program's participating entities and communities' planning activities to ensure required tasks and key activities or deliverables are progressing and completed as scheduled. This includes but is not limited to holding monthly check-in meetings and reviewing monthly performance reports.
2. Review and provide feedback or comments to participating entities on products developed as part of the WCRP planning process, including draft deliverables associated with each of the eight (8) Milestones contained in the WCRP Planning Framework.
3. Provide individualized technical assistance and carry out capacity building sessions to support participating entities and communities in executing their planning activities and tasks in accordance with their respective subrecipient agreements.
4. Identify tendencies regarding difficulties or obstacles confronted by participating entities to help develop appropriate technical assistance and capacity building; Likewise, identify achievements and best practices that can be shared among participating entities.

3. Services, Tasks and Staffing Requirements

This section defines the services, related tasks and staffing requirements that the Supplier must perform. The Supplier will be directly responsible for ensuring the accuracy, timeliness, and completion of all tasks assigned under this contract. The scope of services presented is based upon circumstances existing at the time of solicitation. FPR reserves the right to modify or delete the services and tasks listed and, if appropriate, add additional tasks prior to and during the term of the contemplated contract.

Please read carefully as all Services, Tasks and Staffing requirements must be considered and included in Supplier's Proposal.

3.1. Services and Tasks

FPR is seeking professional services to design and configure customer relationship management (CRM) program and case management features using FPR's existing Salesforce Nonprofit Success Pack (NPSP) platform.

FPR has a Salesforce NPSP Program Management Module (PMM) designed and configured by a third-party vendor for a separate FPR program. This module includes standard and custom objects that allow program staff to input and track program beneficiaries and services, as well as the creation of reports regarding programs, cohorts, program engagements, and service-related objects, including specific forms required by grantees. The existing design and structure of the existing PMM may cover several of the WCRP Program needs. However, the WCRP Program may require further configurations of new and/or customized features and functionalities that respond to program-specific dynamics or needs.

The module configured for the WCRP Program should permit participant case management, data gathering, reporting and analysis functions in compliance with FPR's subrecipient agreement with PRDOH. This will support internal project management and providing technical assistance and capacity building sessions regarding community planning processes and the use of the WCRP's planning, education, and data tools. The module will be used by Program staff to input data, track participant progress and outputs, and oversee the services provided through direct technical assistance and capacity building events. It will also be used to collect data and produce relevant reports from key performance indicators and metrics.

For initial details and assessment of the types of components, data inputs, KPIs and metrics needed for the WCRP Program please see **Exhibit A** of this Scope of Services.

Considering the above, the selected Supplier must perform the following services and related tasks, based on a Salesforce implementation strategy:

1. **Existing features analysis:** Evaluate FPR's existing Salesforce NPSP Project Management Module structure and features. Assess existing standard and custom objects and fields, tabs, page layouts, record types, and picklist values, etc.
2. **Define and document data and processes:** Meet with WCRP Program staff to define and document data requirements and processes to structure a data model.
 - Schedule and execute all necessary meetings and inquiries with WCRP Program Staff to map data to objects and fields.
 - Work with WCRP Program staff to create an Entity Relationship Diagram (ERD) and Process Map, and identify key performance indicators and metrics needed to be included in the reporting infrastructure.
3. **Customize and configuration:** Design and configure a CRM program and case management solution based on WCRP Program responsibilities and needs that allows users to input data, track participant progress and outputs, oversee the services provided through direct technical assistance and capacity building sessions, collect data and produce reports from key performance indicators and metrics.
 - Propose and implement configurations that are compatible with FPR's existing Salesforce NPSP architecture and Project Management Module so that future Salesforce updates and versions can be installed and implemented, and for future configurations if necessary.

- Customize features and functionalities including but not limited to record types, objects and fields, picklist values, page layouts, etc. as needed; configure user profiles, access, visibility, and security; establish permission sets and sharing rules; build or configure automations and assignment rules as necessary.
 - Evaluate need and setup of a community portal for Program Staff to allow visibility and data entry capabilities.
 - Setup requested reports, dashboards and analytic tools based on agreed key performance indicators and metrics.
 - Identify and recommend type and quantity of user licenses (individual or packages), including community license options, needed for up to 2 program/project managers (System Administrators) and 11 field staff (End Users) for desired configuration to fully operate. Please note that licenses will be acquired directly through Salesforce and are not part of this procurement.
 - Support WCRP staff in implementing license management for personnel whose interactions with the configured module vary.
- 4. Rollout and testing:** Launch and perform system tests to ensure that the configured module and features meet required specifications and is fully operational.
- Conduct assessments and tests to the configured module and features with WCRP Program Staff.
 - Collect feedback from test users, analyze, reconfigure, and iterate as necessary.
 - Complete adjustments and retesting, as necessary, to ensure configurations achieve WCRP Program objectives.
- 5. Training:** Provide training and user manuals to WCRP Program personnel.
- Train WCRP Program End Users and System Administrators to ensure they can implement and upkeep the configured module and features in a short and long-term capacity.
 - Provide user manuals and thorough documentation on essential processes so that they can be recreated by WCRP Program Staff as needed.
- 6. Technical Support:** Provide support services to WCRP staff for troubleshooting issues and maintenance of the configured module and features on an as-needed basis for an initial period of one (1) month post-delivery

3.2. Staff Requirements

The Supplier shall have or will secure, at its own expense, all personnel required to perform the services under the contemplated contract. FPR expects the Supplier to provide competent and qualified staff, fully knowledgeable and capable of working with Salesforce NPSP, to perform the scope of services under the contemplated contract. FPR reserves the right to request the removal of any staff not performing up to standard.

4. Deliverables and Timeline

Supplier must ensure that all tasks related to the existing features analysis, documentation, configurations, testing and training services are completed within three (3) months from the execution of the contract resulting from this procurement. Supplier may perform some of these tasks concurrently during this term, but the proposed solution must be fully operational within the

established timeline. All technical support related services will be contemplated for an initial period of (1) one month post-delivery on an as-needed basis.

FPR emphasizes that, **in addition to their proposal, Supplier must complete the attached Cost Form included in this procurement package.** The Cost Form will include the timeline and costs associated with each deliverable or service.

Example:

| Deliverable / Service | Estimated Timeline in Hours (A) | Cost/Rate per Hour (B) | Total Cost per Service (A x B) |
|--------------------------------------|--|-------------------------------|---------------------------------------|
| <i>Existing Features Analysis</i> | 2 hrs. | \$2.00 | \$4.00 |
| Define and Document data & processes | | | |
| Customize & Configuration | | | |
| Rollout & Testing | | | |
| Training | | | |
| Technical Support | | | |

5. Response Requirements

In response to this Solicitation, **the Supplier must return its proposal and the entire completed Solicitation Package** (see all documents attached, including Cost Form) complying with the sections stipulated in this scope of services. Suppliers should carefully follow the format and instructions outlined therein. All documents and information must be fully completed and signed as required. The proposal shall be written in sufficient detail to permit FPR to conduct a meaningful evaluation of the proposed services. However, overly elaborate responses are not requested or desired.

6. Term of Contract

The resulting contract shall be in effect and enforceable between the parties from the date of its execution until March 31, 2023, to include the performance period and any amendments needed.

7. Payment Terms

This procurement process is funded by a CDBG-DR grant allocated by HUD, via the PRDOH. Payment of invoices for the goods and/or services rendered will be based on the payment of funds to FPR from PRDOH. FPR will pay the supplier after the presentation, reconciliation, and approval of the invoice and as soon as FPR receives the reimbursement of funds from PRDOH.

END OF SCOPE OF WORK

By signing this document, I acknowledge that I have read, understand and accept its contents as described:

Supplier Entity Name

Supplier Authorized Representative Signature

Date

Supplier Authorized Representative Printed Name

Scope of Work Authorized by:



Soledad Gaztambide
WCRP Senior Program Officer
Foundation for Puerto Rico

July 13, 2022

Date

Exhibit A

The proposed CRM design and configuration for the WCRP Program should permit participant case management, data gathering, reporting and analysis functions in compliance with FPR's subrecipient agreement with PRDOH. The module will be used by Program staff to input data, track participant progress and outputs, and oversee the services provided through direct technical assistance and capacity building events. It will also be used to collect data and produce relevant reports from key performance indicators and metrics.

FPR has initially identified the following types of program components (such as accounts, services, and KPI/reports), data input fields, and metrics needed for the WCRP Program:

1. Accounts - Program Participants (PRDOH provides program subrecipients & main POCs)

- a. Program subrecipient (organization or municipality)
 - i. Name
 - ii. Type
 1. NGO
 2. Municipality
 - iii. Address
 - iv. Individuals who are staff of the participating organization
 1. Name
 2. Role/Position
 3. Email
 4. Phone Number
 - v. Community/ies (each program subrecipient will have various communities that they will be working with)
 1. Name
 2. Barrio
 3. Municipality
 4. Community Working Group
 - a. Name and contact info of each individuals who belongs to the community's working group
 5. Other individuals (name & contact information) that are members, stakeholders, or allies or of the community

2. Program Services

a. Case Management

i. Onboarding Meeting

1. Type
 - a. In-person
 - b. Phone
 - c. Virtual
2. Date/Duration
3. Attendees
4. Technical Assistance (TA) Referral
 - a. Yes - triggers technical assistance (need to track somehow but can be off-boarded from CRM)
 - b. No

ii. Monthly check-in meeting

1. Type
 - a. In-person
 - b. Phone
 - c. Virtual
2. Date/Duration
3. Attendees
4. TA Referral
 - a. Yes - triggers technical assistance (need to track somehow but can be off-boarded from CRM)
 - b. No
5. Notes
6. Related files/document (attach)

iii. As-needed meeting

1. Type
 - a. In-person
 - i. Location
 - b. Phone
 - c. Virtual
2. Theme
 - a. Follow-up meeting
 - b. Community meeting
 - c. Other
 - i. Describe/User input
3. Date/Duration
4. Attendees
5. TA Referral
 - a. Yes - triggers technical assistance (need to track somehow but can be off-boarded from CRM)
 - b. No

iv. Revision of Monthly Report (performed using GCP portal provided by PRDOH)

1. Account Information
2. Point of Contact (POC)
3. Reporting Period (month/year)
4. Report Approval
 - a. Yes
 - i. Copy of GCP portal receipt/output
 - b. Pending incorporation of comments
 - i. Date comments sent
 - ii. Copy of email/comments

v. Revision of Deliverables

1. Account Information (including community & POC)
2. Deliverable Submitted for Revision (from picklist)
3. Date Received
4. Deliverable Approved?
 - a. Yes
 - i. Copy of Approval Email
 - b. Pending incorporation of comments
 - i. Date comments sent

ii. Copy of email/comments

b. Technical Assistance (TA) Process

i. Request (intake)

1. Account information
2. POC for TA request
3. Theme
 - a. Planning Framework
 - b. Community Participation
 - c. Program Tools
 - d. Etc.
4. Problem Description
5. Program Facilitator Notes
6. Action Needed
 - a. Immediate assistance (ends process)
 - b. Systematic approach
 - i. Assign Internal TA provider
 - c. Referral (external resources or capacity building workshop) (ends process)

ii. Analysis

1. Capacity and/or needs assessment of organization and/or individual
2. Document revision (if needed)
3. Site visit (if needed)
 - a. Working meeting
 - b. Community meeting
 - c. Other meeting
4. Evaluation interviews (if needed)

iii. Implementation

1. Internal preparation summary (work plan to address need)
2. Delivery Summary
 - a. Date
 - b. Attendance
 - c. Type
 - i. Virtual meeting
 - ii. In-person meeting
 - d. Next steps
 - i. Summary
 - ii. Issue resolved?
 1. Yes
 - a. Details
 2. No
 - a. Reason
 - iii. Receipt of TA Completion (could be automated email with summary of delivery and next steps)

iv. Evaluation

1. Survey sent
 - a. Yes (possible to track follow up?)
 - b. No
 - i. Reason

c. Kick-off Workshops

- i. Name
- ii. Description
- iii. Modality
 1. In-person
 2. Virtual
 3. Hybrid
- iv. Date/Duration
- v. Attendance
- vi. Collateral (supporting documents)
 1. Meeting materials
 2. Invitations/promotions
 3. Agenda
- vii. Evaluation Survey

d. Capacity Building (possible to have a calendar?)

- i. Name of event
- ii. Description
- iii. Modality
 1. In-person
 2. Virtual
 3. Hybrid
- iv. Date/Duration
- v. Attendance
- vi. Collateral
 1. Agenda
 2. Meeting Minutes
- vii. Evaluation Survey

3. Key Performance Indicators (KPI) and Reports

1. Progress of community planning processes (by community)
 - a. Milestone achievement (Program has a total of 8 Milestones)
2. Number of completed Community Resilience Plans
3. Internal performance
 - a. Case management performance/characteristics
 - b. Technical assistance performance/characteristics
 - c. Technical assistance requested by theme
 - i. Number of completed technical assistance
 1. Turnaround time
 - d. Capacity building performance/characteristics
 - e. Kick-off Workshop performance/characteristics
 - f. Type and number of services performed/characteristics
4. Account characteristics (for example, number of working groups, number of Program participants)
5. Number of concerns/incidents reported by communities sorted by type