



Salesforce Consultant Request for Proposals

Purpose

The Bush Foundation seeks a qualified Salesforce consultant to provide general support and maintenance for its Salesforce CRM platform. The goal is to optimize the platform's functionality, improve data quality, and enhance user adoption.

About the Bush Foundation

The Bush Foundation works to inspire and support creative problem solving — within and across sectors — to make our region better for everyone. To do this, we invest in great ideas and the people who power them in Minnesota, North Dakota, South Dakota and the 23 Native nations that share the same geography. Learn more at bushfoundation.org.

Project Background

We use Salesforce as a central hub for managing community relationships, grantmaking activities and program evaluation. We aim to leverage Salesforce to its full potential to support our organizational purpose and goals.

While we are satisfied with our current Salesforce consultant, it is part of our practice to periodically open opportunities like this for other organizations to express interest.

Scope of Work

The Salesforce consultant will be responsible for supporting Bush Foundation staff with the following:

- **Platform Health and Maintenance:**
 - Regular system health checks and performance optimization
 - Security updates and patch management
- **Data Management:**
 - Data quality assurance and cleansing
 - Mass data uploads or updates sporadically
 - Assistance and leadership on complex backend Salesforce functions including but not limited to:
 - Flows
 - Validation Rules
 - Integrations connections
 - Community Portal support
- **Foundation Support:**
 - Super User training and onboarding when required on new features
 - Troubleshooting and issue resolution
 - Configuration and customization requests
 - Regular check-ins with Bush Foundation IT Strategy and Support Manager
- **Process Optimization:**
 - Design and implementation of process improvements in partnership with Bush Foundation staff

The selected Salesforce consultant will be expected to collaborate closely with the Foundation's IT team to ensure effective platform management and user satisfaction.

We expect the annual budget for these types of services to range from \$20,000 to \$40,000.

Proposal Requirements

In your proposal, please provide the following.

- **Company Overview:** Provide a brief overview of your company, including experience, expertise and references in Salesforce consulting.
- **Proposed Support Model:** Outline your proposed support model, including service level agreements, response times and escalation procedures.
- **Technical Expertise:** Detail your technical expertise in Salesforce, including certifications, experience with specific modules and knowledge of best practices.
- **Fees:** Provide a budget proposal for ongoing support services. It can be broken up quarterly, monthly or annually as appropriate.

Proposals should not exceed four pages.

Selection Criteria

Staff will use the following to review proposals:

- The organization or consultant's depth of experience with Salesforce administration and development.
- The experience of the individuals working with a similar organization, both in needs size and type.
- Whether the support structure can be achieved within the proposed budget.
- Alignment with our [operating values](#).

Submitting Your Proposal

Submissions are due by Thursday October 31, 2024, at noon Central. Please email your proposal to Kevin Bruins, IT strategy and solutions manager, at kbruins@bushfoundation.org and include a completed [Vendor Demographic Form](#).

If you have any questions, please contact Kevin Bruins.

Selection and Timing

- **Early November:** Staff will review proposals and select organizations moving forward in the review process. All applicants will be notified by email.
- **Mid November:** Staff will select a partner.
- **Early December:** A consultant will be under contract.