



## INTERNATIONAL INSTITUTE FOR DEMOCRACY AND ELECTORAL ASSISTANCE

### LETTER OF INVITATION

Project Name: *CRM & CRM Implementation*

#### **Section 1. General Information**

- 1.1 The International Institute for Democracy and Electoral Assistance (International IDEA) is an intergovernmental organization established in 1995, with member states across all continents, which aims to support sustainable democracy world-wide and assist in the development of institutions and the culture of democracy. At the interface between research, fieldwork and the donor community, IDEA provides a forum for dialogue, builds networks of experts, develops training materials and provides strategic advice at the international, regional and national level, cooperating with a range of organizations.
- 1.2 International IDEA now seeks to employ *a company or related companies* for the assignment entitled: *CRM & CRM Implementation*. The services include *obtaining Constituent Relationship Management (CRM) system licenses*, and to *design, configure, set-up and implement the CRM based on International IDEA needs as well as to support data migration as needed, and train staff in its use*. A detailed description of the assignment is provided in the Terms of Reference attached to this Letter of Invitation. Interested qualified *companies* are invited to submit *a proposal* to participate in the selection.

**Note:** International IDEA anticipates that proposals may come from **one company or organisation** that sells both CRM licenses and provides CRM implementation services (e.g. a software as a service company that sells licenses to a CRM solution and their internal implementation team) OR **two related companies** that work together to sell CRM licenses and manage CRM implementation (e.g. a software as a service company that sells licenses to a CRM solution and an affiliated/related qualified implementation support provider). Either is acceptable as long as both CRM licenses and CRM implementation are included in the proposal.

- 1.3 Tentative timeframe: It is anticipated that the services will commence in *March 2022* and they will have to be completed before *May 2022*.
- 1.4 Language: The official language for the contract, reports and any other documents in relation to the assignment is English.

## **Section 2. Preparation of Proposal**

2.1 Language: The Proposal must be written in English.

2.2 Required experience:

- CRM system must meet functions, scope, technical requirements and security requirements as laid out in section 3 of the Terms of Reference
- Implementation team must be certified in proposed CRM implementation
- Team must have a track record of CRM implementation in NGOs or public agencies
- Strong reputation as quality implementation team, as evidenced by past performance and references
- Full fluency in English
- Preferred if there is the option to provide onsite training in Stockholm, but not a requirement

2.3 Information required: The Proposal must provide the following information

- Qualifications
- Company background details
- Evidence of experience on other similar assignments
- Explanation of the suggested CRM system and critical functions covered
- Explanation of the license level suggested for International IDEA and details of licensing arrangements that will enable scaling decisions to be made.
- Proposed implementation process (approach, timeline, project methodology, division of responsibility between International IDEA and proposing implementation company, roles and responsibilities of each)
- The full contact details (name, title, email address, telephone number) of three client references, preferably in the EU public sector or NGO space
- Completed functionality checklist (please see section 3 of the TOR)

2.4 Financial Proposal:

- List the individual license rate over 1 year time period and specify what functionalities this includes as well as whether or not this includes any ongoing support/troubleshooting. Please also include details of licensing arrangements that will enable scaling decisions to be made (e.g. group licensing prices if we purchase in bulk)
- Project cost for implementation including discovery, implementation and training
- Project cost for data migration support (this will be estimated and may be further refined during negotiation phase, see Q&A for more information on data format and quantity)
- After care/ongoing support cost options beyond what is included in license rate
- Any other required expenses not included in the above

### **Note:**

- International IDEA is not tax-exempt and does not have a VAT number. The Bidder/Service Provider must act in accordance with their country's tax laws as it relates to providing services/goods to the customers and clients
- The Bidder/Service Provider shall be responsible for their own tax obligations as per the laws of the respective country
- The assessment of the financial offer will be based on the price indicated in the vendor's proposal

## **2.5 Declaration of Honour Form**

- Accomplished Declaration of Honour form: Please note that the attached Declaration of Honour Form should be submitted as a separate document. Sections must be ticked YES or NO.
- In the absence of conflict of interest, please mark this section Yes

(3) declares that the above-mentioned person has no unresolved conflict of interest that may cause the impartiality the process of awarding the contract to be questioned, except as disclosed		
SELECTION CRITERIA	YES	NO
(a) no person involved in the preparation of the bid is or was a Staff Member or Member of the Board of Advisers at International IDEA in the six months preceding the submission of the bid	<input type="checkbox"/>	<input type="checkbox"/>
(b) no person involved in the preparation of the bid is a family member of a Staff Member or Member of the Board of Advisers at International IDEA in the six months preceding the submission of the bid	<input type="checkbox"/>	<input type="checkbox"/>
(c) No Staff Member or Member of the Board of Advisers at International IDEA has a material financial interest in the bidder	<input type="checkbox"/>	<input type="checkbox"/>

### Section 3. Submission of Proposal

- 3.1 The Proposal must be submitted in electronic format by e-mail.
- 3.2 The e-mail address for submission is: [eoisubmission@idea.int](mailto:eoisubmission@idea.int)
- 3.3 The deadline date for submission is *Friday February 4 2022, 17.00 CET*

### Section 4. Evaluation of Proposals

- 4.1 The Proposals will be evaluated and scored against the following criteria with respective corresponding points:
  - (i) CRM system track record and reputation (*maximum score 10 points*)
  - (ii) CRM implementation provider with specific professional experience and references for the (1) design, configure, set-up and implementation of the CRM based on client needs and support data migration as needed, and (2) training staff in CRM use (*5 points each, maximum score 10*)
  - (iii) CRM system and CRM implementation provider with experience with similar organisations e.g. international organisations, NGO, public sector, fundraising-based entities (*maximum score 5*);
  - (iv) Fit with International IDEA's stated scope and need in section 3 of TOR (*maximum score 45, 15 points each*) – Please see functionality checklist in section 3 of the TOR
    - a. Whether or not the proposed CRM solution meets the stated **CRM Solution Scope** in section 3 of the TOR. Meets all 8 criteria: 15 points. Meets 5-7 criteria: 12 points. Less than 5: 0. Note that the criteria for GDPR compliance is mandatory, and solutions that cannot achieve this compliance will be scored at zero and not be considered.
    - b. Whether or not the proposed CRM solution meets the stated **Technical and Security Requirements** (5 technical and 8 security requirements, 13 in total) in section 3 of the TOR. Meets all 13 criteria: 15 points. Meets 10-12 criteria: 12 points. Less than 10: 0
    - c. Whether or not the proposed CRM implementation meets the stated **CRM Implementation Scope** in section 3 of the TOR. Meets all 8 criteria: 15 points. Meets 5-7 criteria: 12 points. Less than 5: 0
  - (v) Financial Proposal (*maximum score 30*)

The currency used for evaluation is EURO. Please provide financial proposals in EURO. The financial score will be computed as follows:

The lowest evaluation price proposal ( $E_m$ ) will be given a financial score ( $F_m$ ) of 30 points.

The financial scores of the other proposals will be computed applying the formula:

$$F = 30 \times E_m/E,$$

where:  $E_m$  is the lowest evaluation price, and  
 $E$  is the evaluation price of the proposal under consideration.

The maximum score for initial evaluation is 100 points.

- 4.2 The proposals submitted will be assigned an initial score by the evaluation team using criteria and point allocations indicated above.

Up to two proposing teams ranked highest will be invited to present the proposal to the evaluation team in February 2022, and reference calls will be made to the references provided in the initial proposal.

The presentation will be scored on overall quality and professionalism of presentation and proposing team (20 points).

Based on the proposal presentation and reference calls the evaluation team will then develop a final score for the proposing companies (maximum 120 points, 100 from initial evaluation and 20 from final evaluation). The highest ranked will proceed to negotiate the contract.

If negotiations are successful, the contract will be awarded. If unsuccessful, negotiations will proceed with next ranked company/related company.

## **Section 5. Final Considerations**

- 5.1 International IDEA will not be bound to select any of the bidders.
- 5.2 The following documents are enclosed with this Letter of Invitation:  
Terms of Reference (TOR)  
Declaration of Honour Form  
Contract General Terms and Conditions  
Additional Information in Q&A Form
- 5.3 Should you need any further clarifications with respect to this invitation, please check with available Q&A document and/or contact below on or before 27 January 2022:  
E-mail: [EOI@idea.int](mailto:EOI@idea.int)
- 5.4 We would appreciate your informing us by e-mail upon your receipt of this Letter of Invitation, whether or not you intend to make a submission.