



SCOPE OF WORK

SalesForce Database for
Minnesota Housing Partnership
August 24, 2022

Project Statement:

Minnesota Housing Partnership (MHP) is looking for a SalesForce Implementor to create a database for our organization. MHP envisions this database to be usable and helpful for all departments of the organization as a single source of CRM and project tracking data. The database needs to contain the usual elements of a CRM, but also create a place to track donations, grants, federally-funded project outcomes, events, communications, and advocacy efforts. The resulting database needs to be very user friendly but must communicate with our ERP system, Unanet. MHP would love to see email communications, surveys, and advocacy actions tied to legislative districts as part of this database, but realizes these pieces may need to be 3rd party add-ons.

Questions and Clarification: Please contact Deb Peterson via admin@mhponline.org or 651-925-5539.

Project Steps & Timeline:

August 24	MHP sends out Scope of Work and posts request on its website.
September 9	Implementor submits budget and process for the project to MHP
September 12	MHP begins analysis of submissions
September 13	MHP begins question and answer phase, contract negotiations
October 1	MHP new fiscal year begins; contract finalization
October 15	Discovery phase begins-Implementor will work with representatives from each MHP department to ascertain what is needed, what is optional and what is unrealistic within budgetary restraints.
November 15	Implementor shows MHP basic structure of new database
May 1	Tentative completion of database.
May 15	Training and project completion.

Project Deliverables:

- CRM database built in SalesForce using attached Data Dictionary and other parameters determined during the discovery phase
- Workable CUSTOM API interface with Unanet ERP software to connect to accounting and project budgeting.

- Large number of custom and user-editable contact attributes/tags for reporting and segmenting (at least 100+) potentially including some with automation (*e.g. attendance at X event or response to X communication tags user with Y attribute*).
- Fields/Tables to track Community Development Department activity outcomes, board goals, fundraising efforts, Advocacy and Communications campaigns, survey results
 - Please see Data Dictionary, please request via email from admin@mhponline.org.
 - providing table/field/data needs (*note: suggested handling of required data/fields subject to recommendations by RFP respondent*)
- Reports as outlined for the departments (using samples to guide)
 - Request report samples via email from admin@mhponline.org
- Event registration module
- Survey module that allows the resulting data to end up in the database.
- Built in or 3rd-party modules for:
 - Email marketing platform integrated with contacts
 - Legislative district information to pair with contacts (State and federal)
 - Payment processing of credit card donations

Administration:

The implementor's main contact at MHP will be Deb Peterson via admin@mhponline.org or 651-925-5539.

- Implementor will be required to clearly and regularly detail (at least semi-monthly) what is required from MHP and what MHP should expect from the implementor to limit confusion on either side.
- Meetings will be held weekly and will be scheduled as far in advance as possible.
- MHP requests monthly progress reports and monthly invoicing during discovery and implementation phases.
- Any requests from staff to change the scope of this work, must be approved by the MHP main contact.