



Request for proposal (RFP) for Salesforce technical and consultancy services

Introduction

Founded in 1993, CAMFED is an award-winning pan-African movement revolutionizing how girls' education is delivered. To do this we have established a gold-standard system of accountability to the young people and communities we serve, and have created a model that radically improves girls' prospects of becoming independent, influential women. You can learn more at <https://camfed.org/>

We have ambitious plans for the organisation and the girls and women we serve over the next few years. How we harness and use technology will be a critical factor in the success of these plans, and at the heart of our technology landscape is our Salesforce platform. CAMFED is seeking an equally ambitious and expert Salesforce partner (or partners) to support us on a journey which will see us support more girls and young women.

This will require providing expert Salesforce consultancy, delivering new and enhanced functionality, integrating Salesforce data and functions with other business systems, and working with us on day-to-day support matters.

Process

Thank you for indicating your interest in this RFP. Our intention is to delve deeper into how you would propose to work with CAMFED to improve our systems and ongoing technical support services. These are outlined below as two separate lots.

You are welcome to complete the RFP for either lot, or both, depending on where you see your strengths.

It may be possible to identify a single partner that can support CAMFED across all of our Salesforce activity, but we also recognise that some partners may be better suited to some areas more than others, or indeed take a consortium-style approach. So we are open minded about whether the best outcome will be to contract with a single partner, a coalition, or multiple individual partners, and will consider any reasonable arrangement on its merits.

We are a global organisation, and so similarly we do not have preconceptions about the geographic location of partners. The RFP process and our dialogues with potential partners will help to steer this thinking and ultimately dictate the best arrangement.

Once you have had an opportunity to review the RFP, if your organisation is a good fit for our requirements, there will be the opportunity to organise a video call with relevant staff at CAMFED to explore our needs and the fit with your organisation before you submit the RFP.



There will be a maximum of 30 minutes per lot for discussions at this stage, and we may choose to combine into a single 1 hour slot if you are bidding for both lots, and that is the most practical route. We will be happy to engage with each organisation individually to schedule these conversations.

Following the RFP submission, we expect to shortlist potential partners for each lot. There will then be a presentation for each lot, along with supplementary questions you may need to answer depending on how you responded to the RFP questions. There will be an opportunity to have a further dialogue with CAMFED prior to the presentation.

Confirmation of receipt and submission

Please confirm you have received this RFP and intend to submit a response by email to Tony Rafferty, Head of IT, rfp@camfed.org by 14/09/2026. The timetable thereafter is shown below.

Timetable

Expected timing of RFP process:

RFP issued	03 Sept 2026
Partner dialogues	04 – 18 Sept 2026
RFP responses due	25 Sept 2026
Shortlisted partner presentations	05-09 Oct 2026
Partner selection	12 - 16 Oct 2026
Partner contracts and appointment	19 - 23 Oct 2026

Summary of requirements

CAMFED has a highly customised implementation of Salesforce Sales Cloud making use of Salesforce's Non-profit Success Pack (NPSP), which sits at the heart of many of our organisational processes and houses much of our business-critical data. As such it is a key system that supports our objective of supporting girls through primary, secondary and tertiary education, and young women into life pathways. We also make use of the Certinia finance package (formerly FinancialForce) and Marketing Cloud.

The primary business processes that we use Salesforce to manage are:



- **Operations** - we disperse the income we receive to clients across 6 African countries where we operate and support programmatic activity, including funding primary, secondary and tertiary education, supporting young women into careers, facilitating entrepreneurship and providing business finance and managing our volunteer schemes. Salesforce keeps all of our detailed records and relevant documentation in all of these areas, including personal data for our clients and financial records.
- **Fundraising** - we receive income from statutory funders, trusts, foundations and grant-giving bodies, corporate partners and individuals - from very large philanthropic gifts to low-level consumer giving. Salesforce allows us to record this income and manage our relationships with organisations and individuals, including outbound/inbound communications and document management.
- **Evaluation and Monitoring** - in order to report on the progress and effectiveness of CAMFED's activities, we collect information and data from across our programmes, store it in Salesforce and use reporting functionality to present or share it.
- **Community** - CAMFED has a wider community of contacts called CAMA, made up of young women who belong to our movement to support girls and young women. There is overlap with our client base within this network. Salesforce allows us to manage contact data and relationships with these individuals.
- **Case management** - we track and handle requests for modifications and changes using Salesforce service console.

The primary business uses for Marketing Cloud:

- **Cloud Pages:** As part of our Lead Generation strategy, we use forms hosted on Cloud Pages to capture people's information, map them directly to a Salesforce contact and then push the data back into Marketing Cloud
- **Journeys:** Automations and campaign membership map contacts into engagement journeys
- **Email:** We segment our audiences in Data Extensions and send a calendar of emails to each segment
- **SMS:** We have just launched SMS from within Marketing Cloud to our US audience

We can provide more information during partner dialogues in any of these areas.

Beyond our current situation, we envisage working with a partner to identify other possibilities to further maximise our use of Salesforce and related technologies, for instance this might include:

- Increasing our promotional marketing activity and donor acquisition
- Supporting and growing our enterprise development schemes
- Integrating Salesforce with other systems in order to achieve improved business processes or data exchange.
- Giving access to data and resources outside of our core user bases
- Looking at ways to improve workflows, project management and document/asset management
- Ensuring best practices are followed and risk mitigation reviews are conducted



Lot 1 - Ongoing support and maintenance for Marketing Cloud

CAMFED has a need for a partner to offer a technical support service where we can log requests for changes or small works, as well as problems in need of resolution.

We have a small in-house team that can provide technical support for Salesforce and Marketing Cloud, and so we will be looking for a collaborative relationship where work is sometimes conducted in-house, sometimes by the partner, and sometimes a blend of both.

We envisage this will include:

- A 'service desk' style support arrangement
- Service level agreement for timeliness of response and fix
- Varying levels of engineer experience and expertise relative to the issue at hand
- Scheduled, organised release cycles

Lot 2 - Ongoing support and maintenance for Salesforce Core & Nonprofit Cloud upgrade

This lot includes all the requirements for lot 1 but with a focus on Salesforce Core instead of Marketing Cloud. As well as the requirement to move our existing Salesforce org from NSPS to Non-profit Cloud.

Responding to either lot

In response to lot 1 and/or lot 2 we would like you to answer a series of questions in the following categories:

1. Onboarding and ongoing technical orientation

- a. Please describe the approach you would use to set CAMFED up as a support client
- b. How would you propose to become familiar with the details of our Salesforce implementations and code base in order to effectively work with us?
- c. How long do you envisage onboarding would take?

2. Process and workflow

- a. Please describe your process for requirements gathering and analysis
- b. How do you decide which personnel will work on a particular task? Do you have a triage process?
- c. What internal processes do you have for task and project management?

3. Development regime



- a. Please describe how you conduct development work, including your preferred set up for the different environments needed (e.g. sandbox, production, etc)
- b. How would you handle code deployments and release management?
- c. How would you go about testing and quality assurance?
- d. What documentation would you provide for development work you complete?
How would you ensure we have a consistent shared understanding across our teams?
- e. How would you ensure our data is secure while you carry out development work?

4. Tools and systems

- a. What tools or systems would you use to handle requests and task management?
- b. What tools or systems would you use to handle development and code management?
- c. Do you provide a client-facing portal where we would be able to see progress and updates/queries?

5. Collaboration

- a. What challenges do you expect in an environment where our internal team or another partner is developing and deploying work separately in parallel? How would you tackle these?
- b. How would you work together with our internal team or another partner in order to co-develop code and functionality on shared tasks?
- c. How would you support our internal team with knowledge sharing and upskilling, in order we can work better together?

6. Account / service management

- a. Please describe your account management structure and processes.
- b. What SLAs do you provide?
- c. What warranties do you provide against delivered code (e.g. for remedial work or bug fixing)?

7. Commercial model

- a. How would you propose to set up our billing relationship? E.g. would it involve a time and materials model, a retained fee, or a hybrid? Or another model entirely?
- b. What would your payment schedule be?

For **lot 2** we also require the following:

We are not looking for a proposed solution - we recognise you will not have enough information to provide this - but instead a description of the likely process and approach you would follow to analyse the situation and design a solution.

Please indicate if you have performed this upgrade for another client in the past.



Please feel free to articulate any experience you have in fulfilling similar business requirements for clients using Salesforce (or in fact other complementary technology) to address similar upgrade projects.

8. Evaluation

- a. How would you go about evaluating the status quo in terms of how things work at the moment? And what might change in the new org?
- b. How would you identify pain points and easy wins?
- c. How would you define the parameters of a project like this?
- d. What do you think would be the biggest challenges?

9. Approach

- a. How would you work with our internal technical team, and potentially other technical partners, to establish the best division of labour and collaboratively work on a manageable project plan?
- b. How far would you expect to advise on changing business processes as part of an exercise like this?
- c. Describe your approach to migrating data, including your processes for back-up, disaster recovery, data validation and the archiving of legacy information.

10. Handover

- a. How would you design the UAT protocols? What would you ascertain if it was a satisfactory implementation?
- b. How would you approach delivery of the solution to users? How would you achieve effective training and orientation for them?

Scoring criteria and selection process

CAMFED is committed to openness during this RFP process in how we select a partner or partners.

Each of the categories for every partner will be evaluated by 3 evaluators from our IT team on a scale of 1-5 depending on how closely the answers provided fit with our likely needs, and in comparison with all partners submitting responses.

As we have acknowledged, we are open to a number of scenarios in how we work with partners, and the partners we have approached are varied in nature, and so it is unlikely we will be able to draw direct comparisons in all cases. Ultimately, the primary decision will be at CAMFED's discretion in order to establish the best fit relationships for CAMFED and to serve our clients, based on the information provided and dialogues with partners.



Confirmation of submission

I certify on behalf of [INSERT YOUR COMPANY NAME] that the information provided in this RFP response is accurate.

Name:

Position:

Signature:

Date:

Terms of submission

We ask that all information supplied to you in this document is treated as commercial in confidence. Similarly any information you supply will be treated confidentially by CAMFED. Please note that the completion of this RFP and its submission to CAMFED does not guarantee acceptance to the next stage of the RFP process, nor oblige CAMFED to enter into any commercial relationship with any party.