

Request for Proposals

To Develop a Contact Management System for the All-Island Dairy Association (AIDA)

Issue Date:	August 6, 2021
Deadline for Submitting Questions:	August 16, 2021
Closing Date for Proposals:	August 23, 2021
Closing Time:	5:00 P.M. Colombo
Anticipated Start Date:	September 6, 2021
Project Title:	Market-Oriented Dairy Project
Proposal Reference Number:	MOD-RFP-001-2021

1. Disclaimer

The information contained in this request for proposals (hereinafter referred to as RFP) document is provided to the Offeror(s) by the International Executive Service Corps (IESC) for the USDA funded Sri Lanka Market-Oriented Dairy (MOD) project, award number FCC- 383-2017/031-00.

IESC desires to receive proposals from service providers who can provide services to develop a Dairy Sector Relationship Management Database for All Island Dairy Association (AIDA) assisted by IESC's USDA-funded Sri Lanka Food for Progress program, the Market-Oriented Dairy (MOD) project. The purpose of this RFP document is to provide Offeror(s) with information to assist them in the preparation of their proposals for the services that IESC seeks to source. This RFP document does not claim to contain all the information each Offeror may require. Each Offeror should conduct their own assessment and should check the accuracy, reliability, and completeness of the information in this RFP document, and where necessary obtain independent advice from appropriate sources.

IESC may cancel this RFP and is under no obligation to make an award as a result of this RFP, although IESC fully anticipates doing so. Note that the selected Offeror may be subject to USDA's approval. Any activities under a final award are subject to and shall be

carried out in accordance with the regulations promulgated by the USDA for foreign donation of agricultural commodities, codified at 7 CFR 1499, 2 CFR 200, 2 CFR 400, 2 CFR Chapters I, II, and IV, the provisions of the CCC Charter Act (15 U.S.C. 714), and any other subsequently published rule or regulation governing the FFPr program.

IESC may, at its own discretion, but without being under any obligation to do so, update, amend, or supplement the information in this RFP document. Interested Offerors are responsible for all costs associated with preparation and submission of proposals and will not be reimbursed by IESC. IESC may choose to award for part of the activities in the RFP.

2. Background

IESC is a nonprofit organization dedicated to equitable, sustainable economic growth in developing countries. We believe that a robust private sector is the cornerstone of resilient economies and stable countries. For more than 50 years, IESC has focused on market-driven private enterprise development. IESC is currently the award holder of the USDA-funded Food for Progress Market-Oriented Dairy program in Sri Lanka, which began in September 2017.

The Market-Oriented Dairy (MOD) Project is a five-year program funded by U.S. Department of Agriculture's Food for Progress program. Its objective is to support farmers and enterprises to meet the increased demand for dairy and aims to catalyze sustainable growth in Sri Lanka's dairy sector. The project will increase productivity and expand the trade of milk and milk products in Sri Lanka.

An important component of the MOD Project is to provide support to strengthen AIDA, the leading dairy advocacy trade association in the country, in collaboration with the strategic partner Ceylon Chamber of Commerce. As an industry trade association, AIDA plays an important role in providing a collective voice for individual businesses within the industry.

3. Objective

To customize or design a Contact Management System/Tool to manage dairy industry

association stakeholders.

4. Scope Statement

The customized/designed system will be used to store/access all AIDA members' details. This will help AIDA to have a comprehensive database of all stakeholders in the Dairy Industry. **Please see Annex 1 for more details** on the recommended specifications for the system.

The system will have two main components.

- Comprehensive Relational Database Management System (RDBMS)
- Modern user interface to access data

The basic system functionalities will be:

- Add new AIDA members / create events
- Amend existing members / events
- Delete members
- Email module
- Payment module – simple CSV upload option to record financial inputs
- Report generation – based on requirement
- Archive index – newsletters / circulars / policy updates
- Dashboard board view of members – as per requirements

The Vendor will:

- Understand the system requirement and offer a customized existing system or design a Contact Management System
- Present the proposed platform options / user interface
- Proposed solution must be cost-effective, user-friendly and easy to manage
- Provide report structures

- Quality assurance & product testing
- Create user guidelines for the system
- Vendor will provide the software system according to approved design, specifications, and functionalities
- Handover the final product with permissions, source codes, and rights to the database.

5. Support and Maintenance

The developer will be expected to support and maintain the product, including resolving any bugs in the system and addressing any crucial design changes necessary for the proper use of the system free of charge for a period of one month after which a maintenance agreement can be signed if necessary.

6. Implementation Steps and Expected Period of Performance

- Interested parties to submit their technical and financial proposals separately and per the specifications listed below in Section 9: August 23, 2021
- Weekly update on progress: From the date the contract is executed.
- Handing over of final product: An estimated six weeks from the date of executing the contract.

7. Administration and Logistics

The MOD technical Consultant will assist the selected offeror with any required information for development of the Contact Management System and provide continuous technical support throughout the process.

8. Subaward Contract Type and Deliverables

The subaward will be a **fixed-priced, deliverables-based** subaward, meaning that the selected Offeror will be paid based upon the completion and approval of the final deliverables. The price per deliverable must be included in the cost proposal as

described in **Section 13, Cost Proposal Evaluation**. The list of milestones for use in preparing proposals can be found below; these are subject to change upon post-award negotiations between IESC and the selected Offeror.

Please provide all proposed costs to be included in the cost proposal in Sri Lankan Rupees. The award will be issued in Sri Lankan Rupee (LKR).

8.1 Milestones

- Understand system requirements, meet with MOD technical Consultant to discuss and obtain further details/guidance, propose system design, and identify advantages and functionality.
- Develop the software solution within agreed timeframe
- Conduct pilot testing and present it to users
- Incorporate any feedback and handover the final product along with the user guidelines

8.2 Required Final Deliverables

- Software blueprint to include entity and relationships, list of tables, structures, data types, properties and constraints, form and report layouts, rules to ensure data integrity and security, and other requirements
- Final Contact Management Software
- User guidelines
- Software revisions and/or fixes within the first month after handover as required

9. Instructions to Offerors

9.1. Submission

1. Offers received after the closing date may not be considered.
2. Offers must be in Sri Lankan Rupees (LKR).
3. Technical and cost proposals must be submitted as two separate documents.

Cost information must not be included in the technical proposal.

Offerors must submit their proposals by the closing date and time, as listed on page one, to the following: Janet Ragel, Finance and Operations Specialist, at jragel@iesc.org.

9.2. Clarification and Amendments

Offerors may request clarifications via email to jragel@iesc.org not later than **5:00 P.M., Colombo time, on Monday, August 16, 2021**. IESC will provide answers to these questions and requests for clarification asked by all Offerors simultaneously via email and posted on the IESC website with the RFP before the close of business on **Thursday, August 19, 2021**. IESC may not answer questions before the proposal submission deadline outside of the allotted response period for clarifications. No questions will be answered over the phone or in person.

9.3. Cover Page and Markings

In addition to the required proposal documents listed in sections 10 and 11 below, please include a cover page with your submission for the technical and the cost proposals (separate cover pages). The cover page should be on company letterhead if an offeror is a company and should contain the following information:

- 1) Project or Title (from the front page of this RFP document)
- 2) Proposal Reference Number (from the front page of this RFP document)
- 3) Company/Offeror Name
- 4) Company/Offeror Address
- 5) Name of Company's/Offeror's authorized representative
- 6) Contact person if different than Company's representative
- 7) Telephone #, Cellular/Mobile Phone #, Email address
- 8) Duration of Validity of proposal
- 9) Total Proposed Price (***include price on cover page of cost proposal only***)
- 10) Signature, date, and time

10. Eligibility Requirements

Offeror may be required to present a business license and must have relevant experience in creating easy to use databases for basic relationship management for similar organizations/associations. Award may be contingent upon USDA final approval.

11. Basis for Award

IESC anticipates that award will be based on best-value principles. Accordingly, award will be made to the technically acceptable Offeror(s) whose proposal(s) provides the greatest overall value to IESC and the USDA MOD program, price and other factors considered, and whose proposal(s) conform to all solicitation requirements.

To determine best value, proposals will be evaluated on the criteria below. The number of points assigned, totaling 100 points, indicates the relative importance of each individual criterion. Offerors should note that these criteria serve to: (a) identify the significant factors which Offerors should address in their proposals, and (b) set the standard against which all proposals will be evaluated.

12. Technical Proposal Evaluation

Please read carefully, the following are instructions for preparing proposals. Proposals must be organized into sections corresponding to the sections presented in **12.1 Technical Evaluation Criteria** and numbered accordingly. Please stay in the page limits given below. Only include the requested information and avoid submitting extra content. Any pages exceeding the page limitation for each section of the proposal may not be evaluated.

Proposals shall be written in English with each page numbered consecutively. Cover pages, dividers, and tables of contents are not subject to the page limit.

12.1 Technical Evaluation Criteria

Proposals will be evaluated according to the following criteria. Points will also reflect the overall presentation of the proposal, which should be clear, complete, well organized, and well written. Most importantly, proposals should address all the requirements listed in this RFP.

[1] Technical and management approach: three-page limit; possible points 40

The Offeror must include a description of the technical and management approach that they will utilize to complete the assignment as described in **Section 4. Scope Statement**. This should include an outline of the steps that will be undertaken and a timeline for completion of each deliverable. The technical and management approach section of the proposal will be scored on the effectiveness of the proposal to meet the requirements of MOD as outlined in **Section 4. Scope Statement**.

[2] Offeror's past performance and references: two-page limit (not including samples of previous work, which may be attachments); possible points 30

The proposal must provide a detailed account of the Offeror's record in implementing similar activities to those outlined in the Scope Section. This should include sufficient information to demonstrate the Offeror's performance for the above tasks and activities. Offerors should also provide a minimum of three (3) references for past and present clients for which the Offeror has completed a similar task. References must include contact information.

[3] Offeror's Personnel Experience and Capacities: two-page limit (not including resumes or CVs, which are attachments); possible points 30

The technical proposal must include a description (biographical sketch acceptable) of at least one, but not more than two, personnel who would directly work on designing and providing oversight of the progress of Offeror's personnel to produce required final product and be engaged with IESC/MOD project team and AIDA. Resumes or CVs must

be submitted as attachments for individuals submitted in this section and do not count within the page limitations of this section. This section will be marked on the extent to which the Offeror's or its personnel have experience in producing similar products.

13. Cost Proposal Evaluation

The Offeror shall submit a **separate cost proposal** that includes the project cost of performing the activities as described above. These costs shall be broken down to show the cost of each deliverable that the Offeror proposes for developing the database. As noted above, IESC will pay a fixed price per approved completion of each deliverable as mentioned in **Section 8. Subaward Type and Deliverables**.

All proposed costs must be in accordance with the U.S. Government Cost Principles under 2 CFR 200.

The cost proposal must include:

- a. A spreadsheet that lists each deliverable per **Section 8. Contract Type and Deliverables** and the proposed payment price for each deliverable. All costs should be presented in Sri Lankan Rupees (LKR).

14. Deviations

IESC reserves the right to waive any deviations by offerors from the requirements of this solicitation that in IESC's opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition.

15. Discrepancies

Please read the instructions carefully before submitting your proposal. Any discrepancy in following the instructions or award provisions may disqualify your proposal without recourse or an appeal for reconsideration at any stage.

16. Conflict of Interest Declaration for the MOD Project

The following steps outline IESC's award selection process and should be understood by all Offerors to ensure the transparency of awards and avoid conflict of interest.

- a. Request for Proposals (RFPs) are posted on IESC's website. The offer is open to all qualified offerors;
- b. Clarifications will be emailed to all offerors submitting questions, as well as posted on

IESC's website, simultaneously;

- c. Once the proposals are received, an evaluation committee scores them;
- d. Cost proposals are evaluated for reasonableness, accuracy, and completeness;
- e. The best value proposal is selected based on a combination of the technical score and the cost;
- f. No activity can be started until USDA has approved the appointment of the sub awardee and both IESC and the awardee have signed a formal subaward; and,
- g. IESC policy against fraud and code of business ethics exists throughout the life of the subaward and beyond. Even if the subaward is closed or has expired, if any party is found guilty of fraud, IESC will make a full report to the USDA Office of Inspector General, which may choose to investigate and prosecute guilty parties to the fullest extent of the law.

The selected offeror will be required to comply with all administrative standards and provisions required by USDA.

ANNEX 1: CONTACT MANAGEMENT SYSTEM DETAILS

Contact Management System Specifications

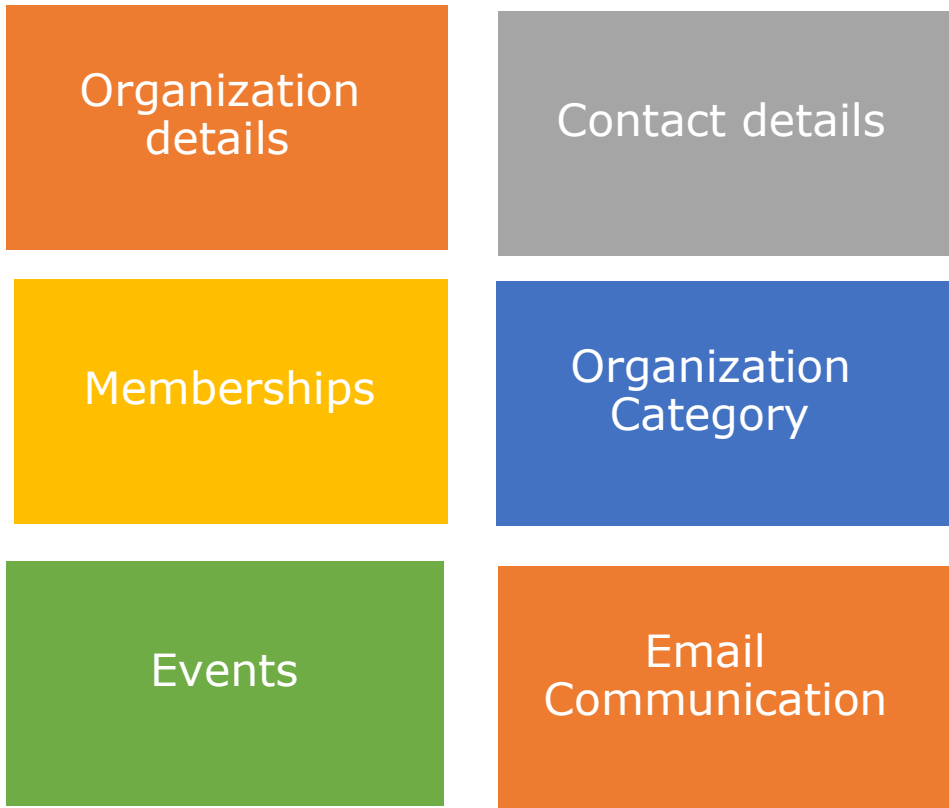


This document is for the initial vendor contact only, more detailed & specifics will be shared at later stage

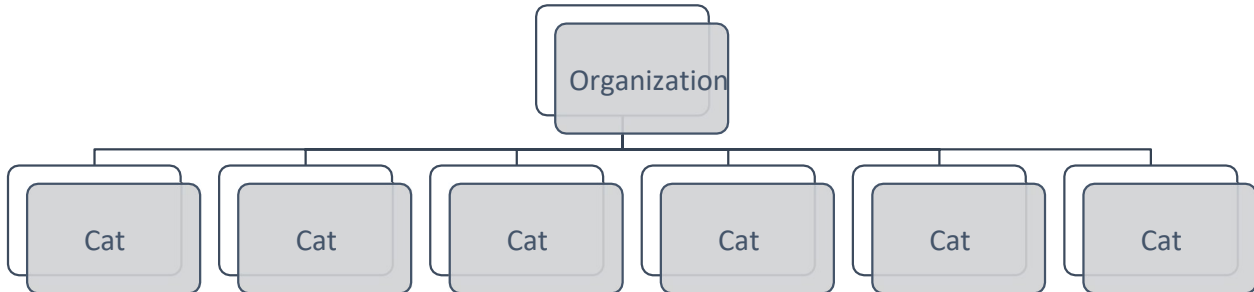
Basic System Functionality



Building Blocks-Contact Management System Database

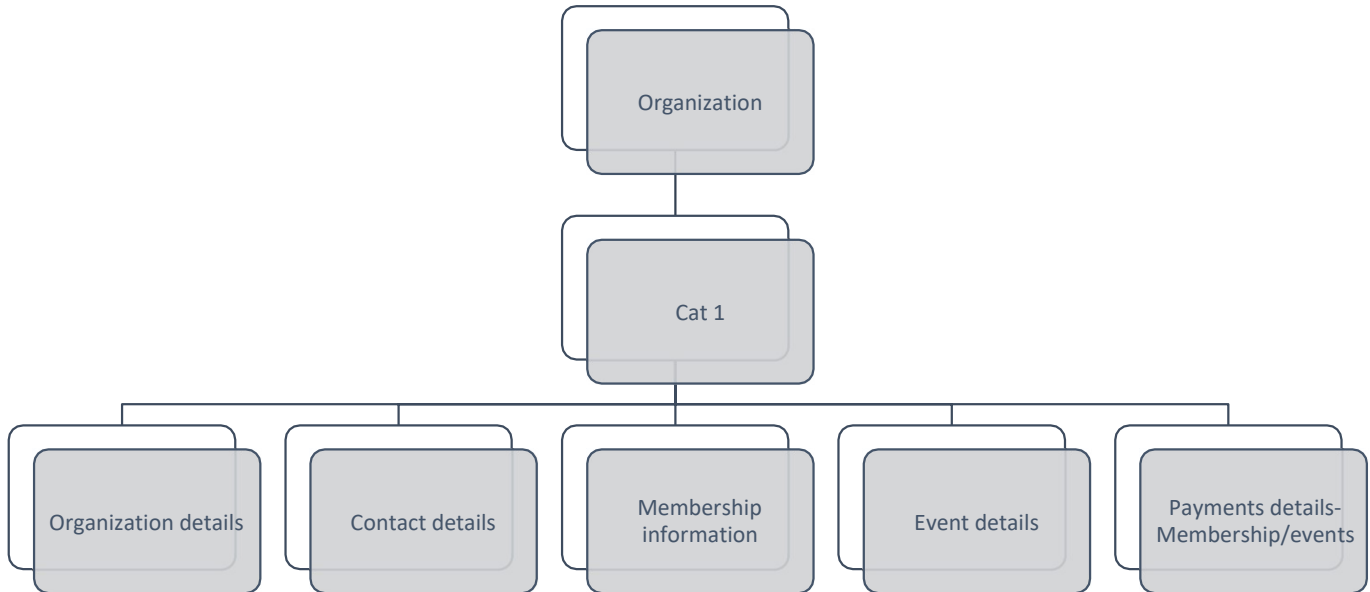


Sample Organization Structure 1



- System will have Organizations, these organizations will be categorized into 18 categories
- 18 Categories are predefined
- System admin should have function to create new category when required

Sample Organization Structure 2



Each organization will have the below data:

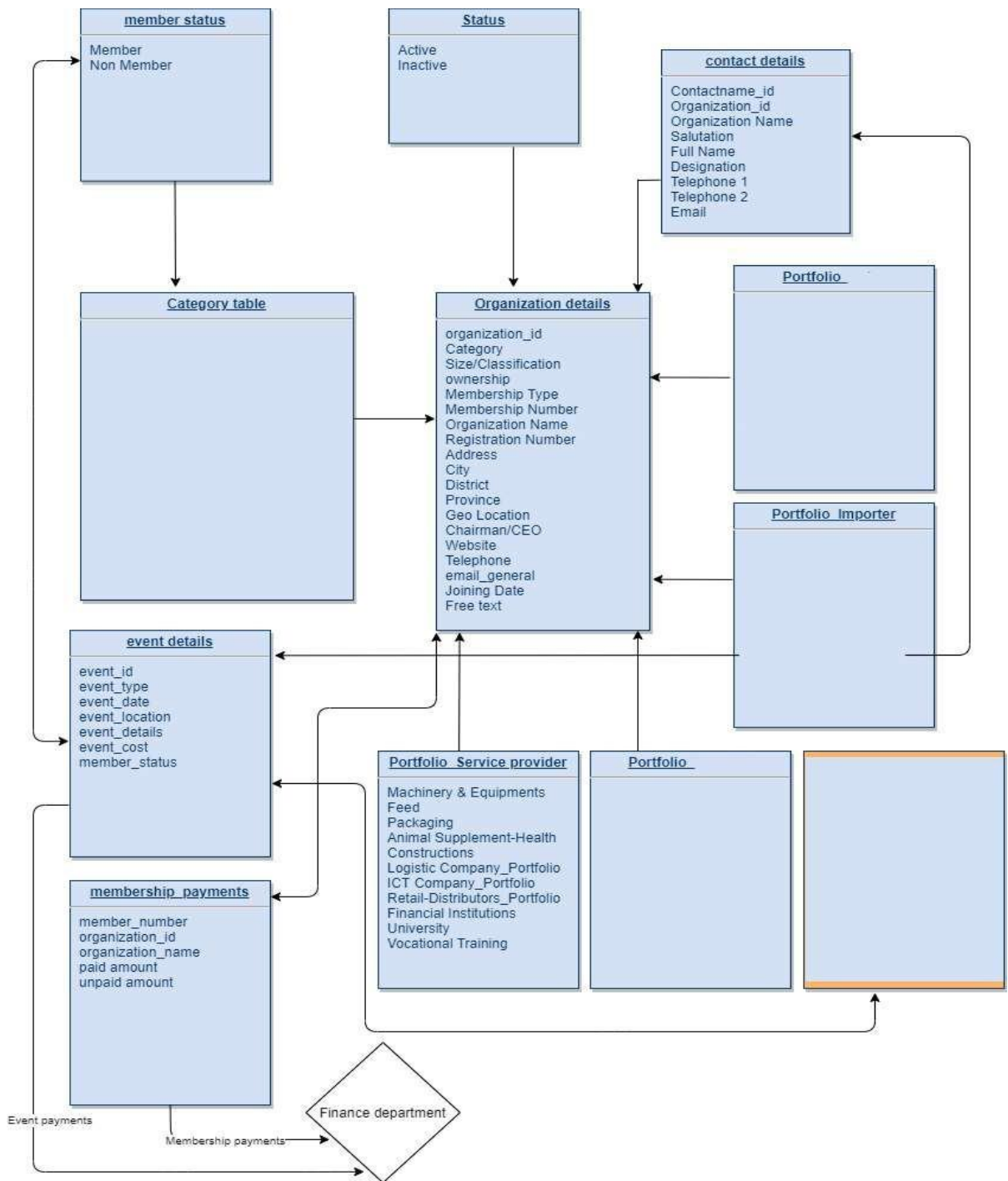
1. Organization details
2. Contact Details
3. Membership information
4. Event Details
5. Payment Details

Contact Management System- RDBMS content

Organization details	Contact Details	Category	Membership	Events	Payment Details
<ul style="list-style-type: none"> •Size/Classification •ownership •Membership Type •Membership Number •Organization Name •Registration Number •Address •City •District •Province •Geo Location •Chairman/CEO •Website •Telephone •Joining Date •Free Text 	<ul style="list-style-type: none"> •Contact Person 1 •Contact Person 2 •Preferred Communication •Telephone 1 •Telephone 2 •Email 1 •Email 2 	<ul style="list-style-type: none"> •Cat 1 •Cat 2 •Cat 3 •.... •Cat 18 	<ul style="list-style-type: none"> • Members •Non Members •Membership Payments •Payment dues 	<ul style="list-style-type: none"> •Events •Date & Time •Location •Fees 	<ul style="list-style-type: none"> •Membership Payments •Event Payments •Due Payments

***This is a sample, more details/tables are available**

Draft RDBMS diagram



Solution Expected from the Vendor

- **Comprehensive RDBMS**

We will provide you with data tables and required fields, you can share best practices on connecting tables

- **UI- Modern-Simple-Clean**

Basic user should be able to navigate options with ease and retrieve required details.

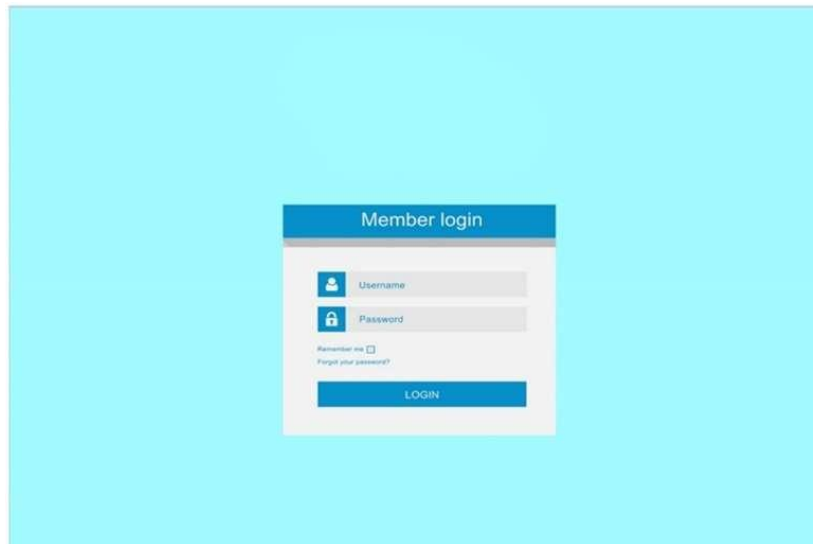
- **Safe & Secured**

Data uploaded on system should be safe and confidentiality should be maintained

- **Web based-Online**

User/users should be able to access the system via link

Expected/Suggested UI



- User can click category and system will populate a list of customers under that category (Organization, name, address, status, category)
- User can click on category or organization name to drill down details

Sample customer screen view

The image shows a sample customer screen view with a light blue background and a grid of dashed lines. The form is divided into several sections:

- Organization Information:** Fields for Organization Name, Registration Number (11111111), Address, City, Province (Western), District (Colombo), Geo Location, Telephone, Website, Chairman, and Category.
- Membership Details:** Fields for System_id (124874546), Size/Classification (Large), ownership (Corporate), Membership Type (Member), Membership Num (154548), Status (Active), and Join Date (01-01-00).
- Free Text:** A large text area for additional information.
- Tabbed Interface:** A row of six tabs: **Contacts**, **Membership Payments**, **Activities**, **Communications**, **Portfolio**, and **Amendments**. A green oval highlights these tabs, and a green arrow points from the text below to the 'Communications' tab.

Contacts Tab: Fields for Person 1 Name, Person 1 Designation, Person 1 Phone number, Person 1 Email, Person 2 Name, Person 2 Designation, Person 2 Phone number, and Person 2 Email.

Membership Payments Tab: Fields for Membership payments, Membership payments due, and Membership payment records.

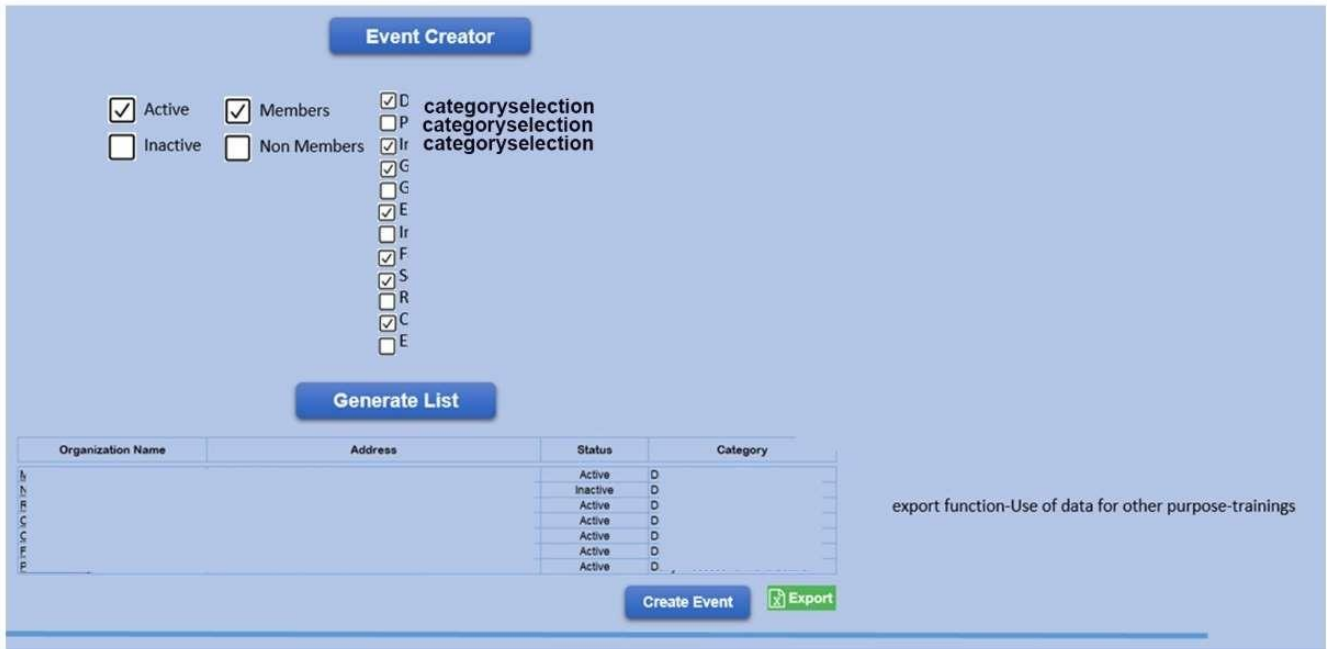
Activities Tab: Fields for Email sent for seminar, Seminar payments, Workshop invitation, Cheese workshop, and Attendance records.

Communications Tab: Fields for New Letter July, AGM details, Policy Update, and New Letter August.

This will be tab like design (excel tabs). When we click on the tab, it will show relevant details. Only one tab will be visible at a time.

Expected/Suggested UI-

Company will host workshops, so the system will be used to decide on participants list by using different filtering (RDBMS tables)



User will use selection criteria to generate an event/participant list to send email. RDBMS data will be used with criteria to generate the list.

Expected/Suggested UI-

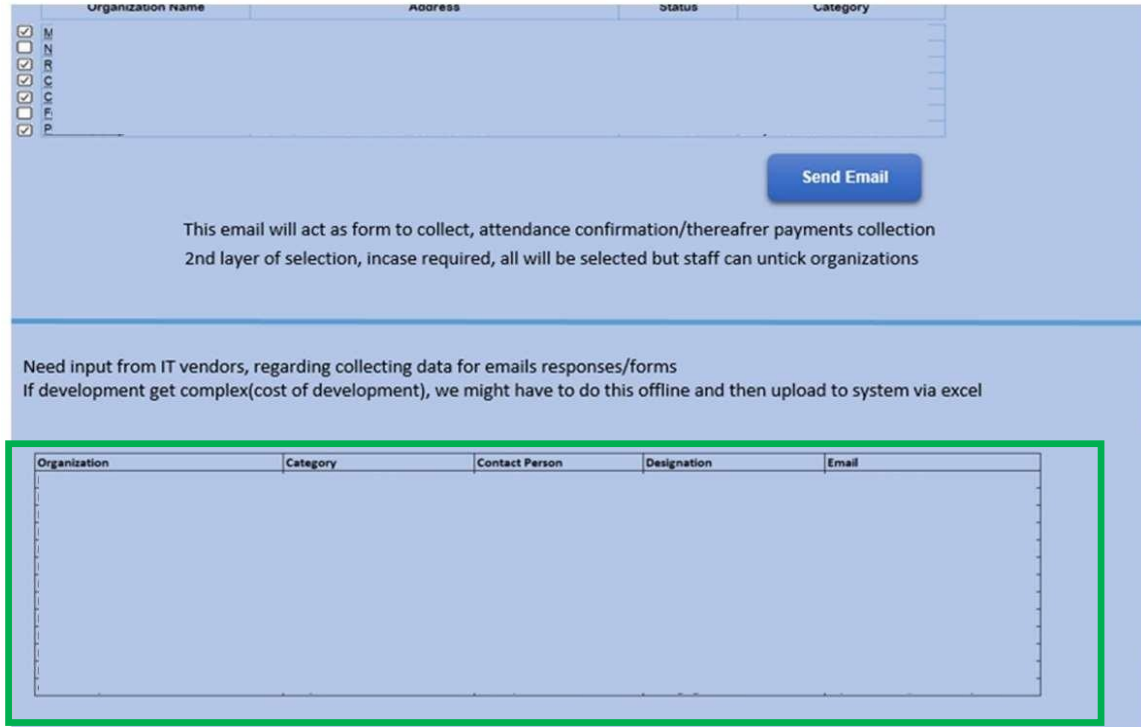
Vendor will host workshops, so the system will be used to decide on participants list by using different filtering(RDBMS tables)

The screenshot shows a web application interface for creating an event and sending an email to participants. The interface is enclosed in a green border. At the top left, there is a blue button labeled "Create Event". Below it, there are two checkboxes: "Paid" (checked) and "Free" (unchecked). There are six input fields arranged in two rows: "Event Type(Drop Down)", "Event Name(Free txt)", "Event Date & Time" in the first row; and "Event Location", "Fees- Member-Non Member", "Registration Deadline" in the second row. Below the input fields is a table with four columns: "Organization Name", "Address", "Status", and "Category". The table has a vertical toolbar on the left side with icons for selection, deletion, and other actions. At the bottom right of the form area, there is a blue button labeled "Send Email". Below the form area, there is a text block: "This email will act as form to collect, attendance confirmation/thereafter payments collection 2nd layer of selection, incase required, all will be selected but staff can untick organizations".

After user creates a participant list, user will input event details and send the email to the participants

Expected/Suggested UI-

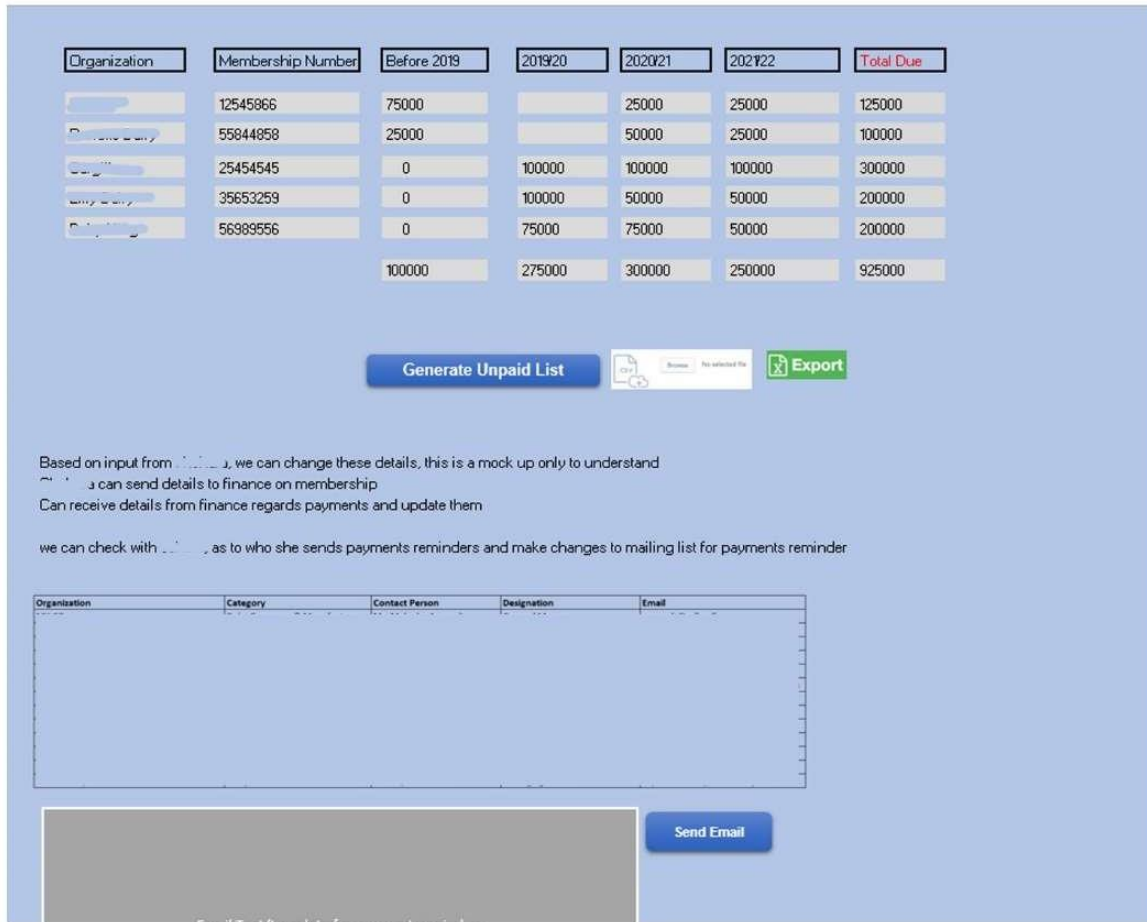
Vendor will host workshops, so the system will be used to decide on participants list by using different filtering (RDBMS tables)



System will also show the participant list on the bottom.

Expected/Suggested UI-

Vendor will design system to manage with membership payments and dues.



User will get details from Finance, so we need to design some csv upload function to capture payments and dues.

Recommendations

- In addition to membership payments, organization will also have records of payments for training programs conducted
- Any payment confirmation will be received from Finance, we do not have any plans to bring finance into this system
- Suggestion is, we use csv uploads to capture data from finance and upload to CMS.
- List of functionalities

RDBMS	
Creating new stakeholder/categories	
Amending existing stakeholders	
Deleting stakeholders	
Email communication with stakeholders-Seminars/Workshops/Virtual	
Seminar/workshop records	
Membership payments/non payments	
Provide data for approved departments/individuals	
Archive records- Easy retrieval- Newsletters/circulars/policy updates	
Report generation	
Any other details	

-END-