



Invitation to Tender

Project: Integration platform iPaaS Tender

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Issue Date: 2021-01-14

Deadline attendance notice: 2021-02-01 at 23:59

Deadline Submission Date & time: 2021-02-10 at 23:59

Definitions

ITT: Invitation to Tender

Tender process: The time period commencing from the invitation to tender to the tender award decision

Tenderer(s): Platform provider

Section 1: Basic information about MSF

Background

MSF in brief

Médecins Sans Frontières (MSF) is an international, independent, medical humanitarian organization that delivers emergency aid to people affected by armed conflict, epidemics, natural disasters and exclusion from healthcare. MSF offers assistance to people based on need, irrespective of race, religion, gender or political affiliation.

MSF in Sweden

The Swedish section of MSF, founded in 1993, has four main areas of activity:

- Fundraising
- Recruitment and deployment of field workers
- Awareness-raising
- Support to the field activities through the innovation and evaluation units.

MSF Sweden raises money through donations and in addition recruits field workers, as well as forms public opinions. We inform the public, politicians, media and experts on the lives of the people we meet in the field. For more information about MSF please visit our website.

Fundraising at MSF Sweden

MSF Sweden's fundraising mission is to generate increased, long-term, cost-effective, ethical and stable financing of MSFs operational needs to guarantee predictable and sustainable income in the long term that will contribute to operational flexibility, independence and impartiality. MSF Sweden requests funds from existing and potential donors through various media including direct mail, email, telephone, and digital advertising throughout the year. In 2019 more than 255 000 people decided to support MSF with over 616 MSEK. Donor relationship and donations processing is the backbone of this successful Fundraising.

There are currently 45 people working at the Fundraising department and the two overarching activities in the Fundraising department are Donor acquisition & Donor cultivation.

The Marketing Unit is accountable for the results of MSF Sweden's fundraising from the target group Private donors. The target group Private donors is individual donors (B2C, excluding major donors). The unit sets the strategy, plans the activities and communication, calculates projections/forecasts results and evaluates/analyses results.

Insight and Production Unit supports the Fundraising Department with expertise in analysis, data visualization, digital strategy, web development, content production and production coordination. With our expertise, efficient production processes and high production quality, we help to secure the long-term goals of the Fundraising Department.

The main responsibilities are:

- Providing expert advice, analysis and insights to stakeholders responsible for the different business areas within the Fundraising Department.
- Coordination, concept development, production and delivery of activities set in the yearly Fundraising Department Activity Plan.
- Supporting the management of, and providing tools for, budgeting, forecasting and planning as well as delivering of reports to external stakeholders.
- Supporting the Fundraising Department with data verification, visualization and donor insights.

Section 2 : Background information for iPaaS provider

MSF Sweden has extensive challenges with data being stranded in data islands all around the existing technology stack. This requires large amounts of manual labor to extract, manipulate and import data to and from various systems such as payment providers, CRM, marketing system, analytics tools, telemarketing tools etc. With an upcoming implementation of a new CRM system, the success and implementation timeline is dependent on data and data quality. An transaction analysis has been performed and three alternatives showcased for best integrate transaction data flows. The decision has been made to go with the iPaaS option. An iPaaS is a central piece in the modern technology architecture, ensuring data transparency and quality.

MSF Sweden has access to large amounts of data but the data is disparate, stored in silos in different systems and formats. This together with sometimes old or otherwise lacking systems have put MSF Sweden in a challenging position.

This need analysis strives to gather information on the needs related to integration of various data sources, systems and the overall technology landscape within MSF Sweden. This in order to be able to become more efficient, increase data quality, manage larger amounts of data of more stakeholders throughout the entire Donor Process. The ambition is to also increase the data based decisions,

prioritizations and plans. The following phases, requirement analysis and function mapping in the purchasing process, will use the information presented in this document.

Identified challenges

- 13 transaction data sources, that will require constant changes and additions over time.
- Poor data transparency and data quality
- Lack of donor transparency with no 360 view of donors and donor communication.
- An ambition to become donor centric and work with improving donor experience throughout the donor lifecycle.
- Utilization of marketing automation in order to increase relevance, timing, personalization etc.

Goals

- Heavily decrease the amount of manual data entry needed to add new contacts and organizations.
- Increased data availability and transparency
- Unlocking data silos and connecting data islands with automatic data transfer between central systems
- Easier and faster to add new data sources, integrating systems
- Decreased dependency on external consultants
- Easier to analyze data
- Increase flexibility in technology landscape and architecture

Needs and Expectations

In order to understand expectations and requirements regarding an iPaaS platform, material is being used from the CRM need-analysis and information gathered in relation to that project.

- Unlocking data silos and connecting data islands
 - Wide support of integration methodologies such as
 - API (such as OpenAPI, SOAP etc.), JavaScript, on prem systems, file transfer, XML, RSS, webhooks.
 - Payment transaction data types
 - Support for digesting SIE files
- Faster and easier integrations of different key systems in MSF technology landscape
 - Library of existing integrations that can be leveraged by MSF
 - Support integration of SaaS services as well as on-prem solutions
 - Possibility to build/set up custom integrations
- Increased data availability and transparency
 - Data should be available where needed and be coherent, independent of the system it resides in.
 - Data merge capabilities

- Data management capabilities
- Ability to work with different data sets/buckets
- Integration builder tool to build new custom integrations
- Easy enough to use product and UI for MSF employee(s) to manage every day operations and administration without need of external specialists.
- Increased data security
 - Less/no manual handling of data, decreasing security exposure and risk for human error
 - Limit exposure of personal data
 - Full control over what data is available where
 - Decrease risks with potential data backups
 - Detailed logs of data transfers and data access
 - Data encryption for data connections, transfers and data in rest
- Ability to manage large volumes of data
 - Efficient and easy to use UI for data management and data and field mapping
 - Data dependence mapping
- Ability to manage a lot of data variables
 - Data mapping capabilities
- Increased data quality
 - Decrease risk of human error
 - Quality control of data via third party data provider and duplicate records control
- Automated data processing
 - Possibility of setting filters, rules, triggers and automations to manage data (business process automation)
 - Possibility to schedule data transfers, batch runs
- GDPR compliance
 - Documentation of data types and what data is stored where
 - Easier to manage anonymization of personal data
 - Data retention management and data deletion
 - Easier consent management by sharing consent settings between systems
- Easier data analysis
 - Faster access to data sets from different source systems
 - Easier to use different analytics tools
- Increase flexibility in technology landscape and architecture
 - Easier, faster and cheaper to change individual systems
 - Decrease nr dependencies for various systems

Integration Requirements

- Native and fully supported integration with the Salesforce platform and the NPSP version of Sales cloud
- Ability to manage transaction flows and existing or easy integration with the following payment providers

- DIBS Easy (Nets)
- Swish
- CellSynt
- Facebook Charity
- BetterNow
- PlusGiro- OCR
- BankGiro
- Autogiro
- Stripe
- iZettle
- Benify
- Klarna
- PlusGiro – Manual
- Other systems
 - Visma
 - Drupal
 - Marketing Automation system (TBD)
 - Hero HR system
 - Scrive
 - Podio
 - Power BI
 - Loxysoft
 - SoMe
 - Facebook
 - Instagram
 - LinkedIn
 - 3rd Party data providers
 - SPAR (current)
 - Bisnode (potentially)

Scope of request

This section is for you as a Respondent to the iPaaS tender request, to get an understanding of what the expectations are from MSF Sweden regarding integration and data management capabilities.

Objective

Implement a long term solution to ensure an efficient MSF technology landscape design with high data availability, security and transparency, enabling MSF to focus on its cause.

Expected Effect Goals

1. A flexible and cost efficient data design and architecture
3. Fast and efficient management of data flows
4. Increased data transparency, availability, control and high data security
5. Efficient GDPR compliance and data retention management

Expectations on the Service Provider

- Provide a proven and stable product that offers native integration with the Salesforce platform.
- GDPR compliant product and provide data storage within EU
- Provide state of the art data security capabilities
- Well documented solution with access to guides, documentation and training material
- Extensive experience of integration of Swedish payment solutions
- A library of existing integrations that can be leveraged by MSF
- A strong network of partners with high competence in the solution

Requirements

The following requirements will have a high impact when evaluating the Service Providers capacity and ability.

1. A scalable, cost efficient and easy to predict TCO solution
2. Fast setup and adding integration sources mentioned above
3. Data storage within EU is a requirement

Section 3 : Invitation to Tender (ITT) – Guidelines of this tender

RFP Terms

These guidelines are intended to ensure that all Tenderers are given fair and equal consideration.

1. By participation in the tender process this automatically signals that the Tenderer accepts these Conditions of Participation.
2. Any information prepared or shared by MSF Sweden in connection with this tender shall remain the property of MSF Sweden and shall be used only for the purpose of this procurement exercise.
3. The Tenderer shall not make contact with any other employee or consultant of MSF Sweden who are in any way connected with this tender process during the period of this tender, unless instructed otherwise by MSF Sweden.
4. Canvassing will lead to disqualification. Any Tenderer who directly or indirectly obtains or attempts to obtain information from other members or employees concerning any other Tenderer, Tender or proposed Tender will be disqualified.

5. Tenderers shall accept and acknowledge that by issuing this tender, MSF Sweden shall not be bound to accept any Tender and reserves the right not to conclude a Contract Agreement for some or all of the services for which Tenders are invited.
6. MSF Sweden reserves the right to amend, add to or withdraw all, or any part of this tender invitation at any time during the tender process.
7. The official contact of the Tenderers will have expressed an interest by completing and submitting to MSF Sweden the tender acknowledgement pro-forma.
8. MSF Sweden has no obligations to the respondent, the purpose is for you as a supplier to qualify for a RFP process and for MSF Sweden to prepare for it.
9. The responding company cannot charge MSF Sweden for any costs for their efforts participating in this RFP process.
10. Any Contract Agreement concluded as a result of this ITT shall be governed by Swedish law.
11. MSF Sweden shall be under no obligation to accept the lowest or any tender.
12. The respondent is required to provide correct information and answer questions truthfully and accurately.

Confidentiality

1. Apart from what is already within the public domain, Tenderers shall not disclose, copy, reproduce, distribute or pass any of the information to any other person. The Tenderer shall at all times treat the contents of this tender process (with its related documents) as confidential. Subject to the exceptions referred to in paragraph 2 in Confidentiality (below).
2. Exceptions of disclosure, to pass or distribute any of the information by the tenderer are permitted if the sole purpose is to enable a Tender to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Tenderer. For example, for legal advice or if the Tenderer is legally required to make such a disclosure.
3. MSF Sweden reserves the right to distribute information that is materially relevant to the procurement to all Tenderers, even if the information has only been requested by one Tenderer.
4. MSF Sweden may disclose detailed information relating to Tenders to its employees or advisers and may make any Contract Agreement documents available for private inspection by its employees or advisers.
5. MSF Sweden will also endeavor to respect any commercially sensitive information provided by the tenderer. In case the Tenderer should provide such information, it should be clearly identified what is 'commercially sensitive' including the time period it will remain so, while explaining the potential implications of the disclosure.

Tender period and validity

1. Your tender quotation should remain open for acceptance for a period of 60 days as any tender quote that is valid for a shorter period may be rejected.
2. Timeframes indicated in this document: these act as a guide and while there may be no intention to deviate from this, MSF Sweden reserves the right to do so.

Tender Phases

1. Start of RFP: 2021-01-14
2. Last date for tender attendance notice: 2021-02-01
3. Opportunity for introduction meetings will be scheduled for the week after attendance has closed (week 6), in February 2021
4. Tender proposal should be submitted by supplier no later than: 23.59 on 2021-02-10
5. Expected Decision, 2021-02-19

Tender Attendance Notification

- The first step is for you to announce your intention to participate in the RFP.
 - Send an e-mail to infosystem@stockholm.msf.org
 - Subject field: "Participate in Integration platform iPaaS Tender".
 - Include your company name and contact information in the mail
 - **Note:** This email will be used in all communication with MSF Sweden.
 - You will then receive an e-mail response as a verification we have received your participation.
 - Please notice the last date to announce attendance!

Tender Proposal Structure

1. Please provide a cover letter, in PDF format that should contain:
 - a. Name and address of the Service Provider
 - b. Name, title, telephone number, and e-mail address of the person authorized to commit the Service Provider to a contract
 - c. Name, title, telephone number, and e-mail address of the person to be contacted regarding the content of the tender, if different from above
 - d. Declaration that the Tenderer commits to the terms described in their tender and assumes responsibility for any pre-contract costs incurred during the bid and negotiation phases
 - e. Company description with a short introduction to your company with a brief history, number of current employees, financial status and service portfolio.
2. The tender proposal should be structured to clearly state a total price, including all line items such as services, start fees etc. needed to deliver the proposed solution.
3. Provide a suggested cost and product implementation roadmap of the proposed solution
4. Specify a project start date where the work is initiated and dates for suggested important milestones.
5. It should be clearly stated when (in time or stage) different costs are activated such as license costs or start up fees.
6. Information explaining used pricing model.

7. The contract terms need to be provided with the proposal such as General Terms and conditions (TC), Terms of Service (TOC), Service Level Agreement (SLA), Data Processing Agreements (DPA).
8. Customer references from similar organizations or use cases should be appended to or linked from the proposal. Customer references and contacts may be made as part of the procurement process for Tender award. This may include visits and written references.
9. Sustainability, Environmental and social aspects, such as being a responsible employer, are very important to MSF Sweden. Therefore we kindly ask our supplier's to describe their efforts in relation to sustainability. This can be done either by including a link to the sustainability report (if existing) with the tender, or as a separate section in the tender submitted.

Project timeline

- The iPaaS is expected to be integrated with Salesforce NPSP and be an integral part of the new data and technology architecture.
- Critical payment transaction sources need to have been integrated with Salesforce NPSP before august 2021.

Tender related questions

- Any participating provider may request further clarification on matters pertaining to this by submitting its question(s) in writing via email to the official email address, infosystem@stockholm.msf.org with project name "PARTICIPATE IN iPaaS TENDER" in subject.
- Klas Bernehjält is MSF Sweden's contact person and project manager of this RFP. MSF Sweden will endeavor to answer all questions as quickly as possible but cannot guarantee any response time. Phone number is: +46700258849
- From the time the tenders are opened until the contract is awarded, if any Tenderer wishes to contact MSF Sweden on any matter related to its tender, it should do so via email to the official email address infosystem@stockholm.msf.org. MSF Sweden will try to respond as quickly as possible.
- Any question regarding the RFP deemed relevant for all tenderers can anonymously be posted on a shared document that all Respondents can access (as MSF Policy).

Additional tender information

- Participants in the tender process will be sent further information about the CRM solution and the related CRM project.
- MSF will if possible, share information throughout the process regarding progress of related tender processes.