**Call for Tender for CRM Implementation and maintenance operations**

*The Alliance of Liberals and Democrats for Europe Party (ALDE Party) is the third largest European political family, bringing together parties with common liberal, democrat and reform ideas from more than 40 European countries. The Brussels-based ALDE Party Secretariat supports the activities of the Party; organises its meetings; manages its external communication; and facilitates European policy development and networking amongst liberal parties. To support our growing activities, we are now seeking a:*

**Service provider on CRM Implementation and maintenance operations**

**Purpose of the contract**

The purpose of this call for tender is to conclude a contract for the provision of CRM implementation services and website maintenance operations. Please refer to the fields outlined in the tender specifications for further details. Include estimated value of the contract.

**Services required**

A description of the domains is given hereafter. It should be noted that the descriptions are indicative, and the definitions are non-exhaustive:

The ALDE Party secretariat will be implementing Odoo CRM as its main CRM to use for internal organisation of daily activities. We are looking for a partner to assist in the following ways:

* Provide support in implementing the CRM system for the purposes of the organisation.
* Assist with transitioning the parties' contacts database (aprox. 50,000) from the current system to Odoo.
* Design email templates based on the parties' branding manual, replicating and possibly improving the current look and feel of our newsletters.
* Assist with recreating target audiences based on the parties' communication strategy.
* Implement email automations based on the parties' communication strategy.
* Designing appropriate workflows to suit secretariat procedures in the fields of but not limited to contact management, event management, finances, dashboards.
* Support staff with Odoo-based website operations (creation and customisation of website pages, implementation of new functionality if needed)
* Support and maintenance to address and support staff questions, workflows and projects

**Exclusion and selection criteria**

**Exclusion criteria**

Participation in this tender procedure is only open to tenderers (all entities involved, including subcontractors and consortium members) that are not in a situation of exclusion as specified in Annex II, which includes:

* bankruptcy and insolvency situations;
* non-payment of taxes or social security contributions;
* grave professional misconduct;
* fraud, corruption, participation in a criminal organisation etc.;
* serious breach of contract.

**Selection criteria – technical and professional requirements**

* Proven experience of similar succesful projects, ideally in the non-profit sector.
* Working hours: *the company must be in position to provide the aforementioned services during normal working hours (Monday to Friday from 9:00 to 18:00, local Brussels time).*
* Adequately staffed and technically equipped for a smooth and efficient performance of the tasks required in the purpose of the contract.
* Excellent knowledge of *English*.
* Security web interface and compliance with GDPR: the system's ability to protect sensitive customer data and ensure compliance with relevant data protection regulations.

**Award criteria**

Participants will be evaluated on the following criteria:

|  |  |  |
| --- | --- | --- |
| **Qualitative award criteria (60%)** | **Minimum points** | **Maximum points** |
| 1. Portfolio of similar projects: Offer must include portfolio of similar projects completed successfully. | 20 | 40 |
| 2. Implementation Strategy: The clarity and feasibility of the vendor's plan for deploying the CRM system within the organization. | 20 | 40 |
| 3. Training and Documentation: The quality and comprehensiveness of the training programs and documentation provided with the CRM system. Offer must include portfolio of similar documentation. | 10 | 20 |
| **Total number of points** | **50** | **100** |
| **Quantitative award criteria (40%)** | **Minimum points** | **Maximum points** |
| Price of the offer submitted | 50 | 100 |

**We offer:**

We are offering a one-year contract with the possibility of renewal for up to five years, to be reviewed on a yearly basis.

**To apply:**

Please apply by sending a detailed proposal in English, addressing the below elements:

1. Overview of your company, including its background, experience, and expertise in providing the required services.
2. Methodology and approach to ensure accurate and timely delivery of services (project implementation proposal).
3. Portfolio of existing, similar projects developed by your company.
4. Appendix I - Pricing Template.
5. Appendix II – Selection and exclusion criteria.

Tenders must be submitted together with Appendix 1 and 2, filled in and signed, by 8 February 2024to Mircea Serdin, CRM Manager at [mserdin@aldeparty.eu](mailto:mserdin@aldeparty.eu) . The deadline for the selection of the tenderer is set by 8 March 2024.