

## Request for Quotations (RFQ)

### Procurement of the service of Customer Relationship Management (CRM)

Representative Office of Helvetas Swiss Intercooperation SRB invites interested parties to provide services as described below.

#### 1. Contract description

Helvetas Swiss Intercooperation is an independent organisation for development based in Switzerland committed to bringing about real change for disadvantaged people in about thirty countries in Africa, Asia, Latin America and Eastern Europe.

The Representative Office of Helvetas Swiss Intercooperation SRB (Helvetas SRB) is publishing this call for the Procurement of Customer Relationship Management (CRM) expert/s who will be delivering training and mentoring services to CSOs supported by project "an Active Civil Society Together - ACT ([www.act.org.rs](http://www.act.org.rs)) funded by the Swiss Government.

#### 2. Timetable

	DATE	TIME - CET
Invitation to bidders	13/01/2025	-
Deadline for written enquiries	23/01/2024	16:00
Last date for Helvetas SRB to issue clarifications	24/01/2024	16:00
<b>Deadline for submitting offers</b>	<b>27/01/2025</b>	<b>12:00</b>
Offers opening session	28/01/2025	13:00
Evaluation of offers	28/01/2025	14:00
Notification of award to the successful bidder*	31/01/2024	16:00
Signature of the Contract *	01/02/2024	12:00

*\*Subject to change.*

#### 3. Nature of the contract

Service contract (agreement).

#### 4. Negotiations

Representative office Helvetas Swiss Intercooperation SRB reserves the right to enter into negotiations with all or part of eligible companies/organisations in order to amend and/or complete their original offers. Negotiations may concern the technical, financial, legal and other aspects of the contract.

#### 5. Eligibility

Invited legal entities should be registered in the Republic of Serbia, while invited individuals have to

be residents of the Republic of Serbia.

#### 6. Costs for preparing offers:

No costs incurred by the legal entity/individual in preparing and submitting the offers are reimbursable. Such costs fall under the responsibility of the legal entity/individual, including the costs incurred during negotiating and interviewing process.

#### 7. Sub-contracting

Sub-contracting to another legal person is not allowed.

#### 8. Submission of offers:

The offers need to be submitted via email with Subject Name: **Reference No: PRF - 01/2025** or via post office (all documentation must be sent with Notice of receipt) with a note: **Reference No: PRF - 01/2025**.

Offer shall contain:

- **Technical and Financial offer** –

The Financial offer must be presented in EUR. The fees proposed in this offer should be all inclusive; the legal entity/individual will cover all costs to perform their tasks (e.g. office accommodation, transport, internet access and equipment, administrative and secretarial support, interpretation etc.). Representative office Helvetas Swiss Intercooperation SRB is exempt from VAT, thus the fees offered should be without VAT. The legal entity/individual is responsible for all other taxes and duties in compliance with the legislation of the Republic of Serbia.

Offers must be submitted via email in English or Serbian language to the following e-mail address:

**[procurement.srb@helvetas.org](mailto:procurement.srb@helvetas.org)**

Offers submitted after the deadline mentioned under point 2 Timetable of this RFQ will not be considered.

#### 9. Evaluation of offers:

Each offer will be evaluated in accordance with the criteria and the weighting as detailed below. The entire evaluation procedure is confidential. The Purchasing Committee (PC) decisions are collective and its deliberations are held in closed session. The members of the PC are bound to secrecy. The evaluation reports and written records are for official use only and may be communicated neither to the companies/organisations who submitted the offer nor to any party other than Representative office Helvetas Swiss Intercooperation SRB.

#### Eligibility criteria

Requirements	Documentary evidence
1. Offers submitted on time as per point 2 - Timetable	N/A
2. The legal entity is registered in the Republic of Serbia or individuals are residents of the Republic of Serbia.	The full Registration certificate or Serbian ID/Residence permit for individuals.

3. Tax Identification Number (TIN) number	TIN certificate (if applicable)
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The legal entity/ individuals that pass the eligibility criteria will be processed for further evaluation.

### Evaluation criteria of eligible offers

Each offer will be evaluated in accordance with the criteria and the weighting as detailed below.

The entire evaluation procedure is confidential. The Purchasing Committee (PC) decisions are collective and its deliberations are held in closed session. The members of the PC are bound to secrecy. The evaluation reports and written records are for official use only and may be communicated neither to the companies/organisations who submitted the offer nor to any party other than Representative Office of Helvetas Swiss Intercooperation SRB.

### Evaluation Criteria of Eligible Offers

#### Technical Offer Evaluation Criteria

<b>Requirements</b>	<b>Documentary evidence</b>
<b>1. Proposed methodology:</b>	Proposed methodology, ensuring it is appropriate for addressing the objectives, expected results and main tasks and activities of the consultants.
<b>2. Expertise and Qualifications:</b>	Provide at least one Curriculum Vitae (CVs) in Serbian of expert who will be actively engaged in the consultancy. Each CV should detail the professional qualifications, relevant experience, and expertise of the respective expert.
<b>3. References:</b>	Include references to a minimum of two relevant consultancy related to implementing CRM systems.

#### Financial Offer Evaluation Criteria

<b>Requirements</b>	<b>Documentary evidence</b>
Financial offer provided by supplier	Financial offer in EUR

The weighting of the criteria for evaluation of technical and financial offers are as follows (for scoring evaluation):

<b>Criteria</b>	<b>Max points</b>
<b>Technical Offer*</b>	<b>70</b>
Proposed methodology:	25
Expertise and Qualifications:	25
Reference:	20
<b>Financial Offer</b>	<b>30</b>

After evaluation of offers, Service Contract will be awarded to the economically most advantageous offer based on above criteria. Representative Office of Helvetas Swiss Intercooperation SRB reserves the right to purchase/contract only part of required services, or cancel this procedure should it not be satisfied with the quality of offers.

## **10. Contract Signing**

Within five days of receipt of the purchase order/contract already signed by the *Representative Office of Helvetas Swiss Intercooperation SRB*, the selected legal entity/individual shall sign and date the contract. Failure of the selected legal entity/individual to comply with this requirement may constitute grounds for annulling the decision to award the contract. In this event, *Representative Office of Helvetas Swiss Intercooperation SRB* may award the RFQ to another bidder or cancel the RFQ procedure.

## **11. Payment Terms**

*Representative Office of Helvetas Swiss Intercooperation SRB* is not a payer of value added tax (VAT). Prices in the financial offer must be submitted, taking into account all expenses.

The payment will be made via bank account transfer to the winner of the tender in RSD within a maximum of 30 working days from the date of acceptance of invoice for services rendered.

The amount in RSD will be calculated based on the average exchange rate of the National Bank of Serbia on the date the contract was signed.

Cases of non-performance of obligation and their legal consequences will be separately indicated in the contract.

## **12. Terms of Cooperation**

In the case of a contracting, the parties will have to perform according to the established time and in accordance with *Representative Office of Helvetas Swiss Intercooperation SRB* – Service provider contract. *Representative Office of Helvetas Swiss Intercooperation SRB* has the right to increase or decrease the number of ordered items. *Representative Office of the Helvetas Swiss Intercooperation SRB* has the right to choose a supplier/ implementer on the given offer according to its own discretion. In case of failure or non-compliance with contractual obligations, *Representative Office of Helvetas Swiss Intercooperation SRB* has a unilateral right to terminate the contract without incurring any legal obligation. The Applicant has to be familiar with all instructions, forms and requirements mentioned in the RFQ. The responsibility for the submission of the offer in accordance to these requirements lies entirely with the Applicant. The *Representative Office of Helvetas Swiss Intercooperation SRB* signs a service contract with the winning bidder.

The contract will come into force upon signature by both parties. *If substantial errors, irregularities or fraud are discovered after the award of the purchase order/ contract, Representative Office of Helvetas Swiss Intercooperation SRB may refrain from concluding the purchase order/contract and/or terminate the purchase order/ contract.*

## **10. Operational Language**

*All written communications for this RFQ procedure and service contract must be in English or Serbian.*

## **11. Additional Information**

*The conclusion of the RFQ and the award of any purchase order/ contract are subject to the availability of funds. Representative Office of Helvetas Swiss Intercooperation SRB reserves the right to annul this RFQ procedure at any time, without any liability on its side.*

## 12. Annexes

### a. Annex 1

#### Terms of reference (ToR)

**Contract duration:** from 01.02.2025 to: 31.12.2025

#### 1. Background

Building on the achievements and lessons learned of the Project „For an Active Civil Society Together” ACT-1 (2019-2023) and considering the deteriorating environment for civic engagement in Serbia, ACT-2 continues to strengthen civil society actors across the country by facilitating the transformation process of mission driven CSO in their efforts to consolidate the constituencies, diversify sources of funding and engage citizens in public dialogue and participatory decision making at all levels. With the aim to further increase effectiveness and impact, ACT-2 seeks to actively include also informal civil society movements, support civil society cooperation and joint initiatives within and across selected thematic domains, and promotes dialogue and collaboration between the civil society, the public and private sector and other relevant system actors.

SDC supports the Program “For an Active Civil Society – Together” (ACT) phase 2 (2023-2027) through implementing partners HELVETAS Swiss Intercooperation (HSI) and Civic Initiatives, Belgrade.

The overall goal of the is to engage citizens in public dialogue, participatory decision making and advocacy processes at local and national level, through and with the support of strengthened, mission-driven and mutually connected CSOs, informal groups and other stakeholders.

To achieve the overall goal, the Project will focus on three outcomes:

**Outcome 1 (CSOs):** CSOs and informal groups are effective in pursuing their mission and engaging in advocacy, gradually increase and strengthen their constituency, are financially viable and responsive and accountable to citizens.

**Outcome 2 (Civil society networking and collaboration):** CSOs and informal civil society groups regularly exchange and coordinate with each other in thematic areas and jointly advocate on issues of shared concern with the aim to achieve greater impact.

**Outcome 3 (Multi-sector dialogue and collaboration):** Civil society actors initiate and co-create spaces for dialogue, partnerships and collaboration with local authorities, private sector, media, academia, and other non-state stakeholders.

The Project will ensure inter-linkages between these three outcomes by following a gradual, but flexible approach from identification and strengthening of individual partner CSOs and informal groups (Outcome 1) to fostering and supporting networking and joint advocacy initiatives among different and mutually complementary civil society actors (Outcome 2) and creating space for multi-sector dialogue and collaboration among civil society and other sectors (Outcome 3).

#### 2. Objectives of the consultancy

The primary objective is to design, configure, and implement user-friendly CRM system tailored to the needs of the four CSOs. The CRM will enable these organizations to manage their relationships with stakeholders, donors, beneficiaries, and partners efficiently.

### 3. Expected results (or Output)

The key expected result/output of the consultancy is the **successful implementation of the CRM system for four civil society organizations** that will result in improved efficiency in managing stakeholder relationships and communication; enhanced donor and grant tracking capabilities; streamlined volunteer and event management processes and greater collaboration and information sharing within each CSO.

### 4. Main Tasks and Activities of the Consultant

Specifically, the consultants would be expected to:

1. Conduct a needs assessment with each of the four CSOs to identify their specific CRM requirements.
2. Recommend a suitable CRM platform (cloud-based, open-source, or proprietary) that aligns with the CSOs' needs and budgets.
3. Configure the CRM system to include:
  - o Stakeholder database management.
  - o Donor management.
  - o Volunteer and event management.
  - o Automated reporting and analytics.
  - o Integration with communication tools (e.g., email).
4. Provide user training for the staff of the four CSOs.
5. Offer post-implementation support for three months to address any technical or operational issues.

### 5. Timeline

The entire project is expected to be completed within 11 months from the date of signing the contract.

### 5. Deliverables and Timeline

These are key deliverables with timeline for constituency building research consultancy:

<b>Key tasks:</b>	<b>Deliverables:</b>	<b>Timeline:</b>
Conduct needs assessment with four CSOs	<b>Needs Assessment Report</b> - a detailed document outlining the requirements of each CSO.	By February 28 <sup>th</sup> , 2025.
Develop implementation plan	<b>Implementation Plan:</b> A step-by-step guide detailing the implementation phases, timelines, and milestones.	By March 16 <sup>th</sup> , 2025.

Develop CRM system for four CSOs	<b>Customized CRM Systems:</b> Fully operational CRM platforms configured for each of the four CSOs.	By May 16th, 2025.
Delivering training session for four CSOs	<b>Training Sessions:</b> Comprehensive training materials and sessions for staff members.	By May 31 <sup>st</sup> , 2025.
Delivering mentorship sessions with four CSOs	<b>Mentorship sessions</b> will include follow-up online meetings with CSOs covering post-implementation support.	By November 30, 2025
Development of the final report	<b>Final Report:</b> Documentation of the implementation process, including lessons learned and recommendations for future use.	By December 15th, 2025

## 6. Requirements

Specifically, consultants are expected to fulfill the following requirements:

### Qualifications of the Consultant/Company:

- Proven experience in implementing CRM systems for nonprofit organizations.
- Strong understanding of the operational needs of CSOs.
- Proficiency in CRM platforms such as CiviCRM, Salesforce, HubSpot, Monday.com CRM, Microsoft Dynamics 365 or equivalent.
- Demonstrated ability to provide training and post-implementation support.
- Excellent communication and project management skills.

### 7. Budget:

The proposed budget must incorporate all costs, cost of CRM platform licensing (if applicable), fees for consultancy and implementation services, costs for training and post-implementation support, travel expenses, accommodation, per diems, materials, equipment, and any additional expenses.

The calculation of estimated costs should be thorough, factoring in the cost of each component based on current market rates.

The overall budget amount should be denominated in euros (EUR), explicitly detailing the number of consultancy days and the corresponding prices for each day in gross amounts.

It is important to note that the Representative Office of Helvetas Swiss Intercooperation SRB is not subject to Value Added Tax (VAT).

### 8. Logistics

Consultant/s are obligated to independently organize all tasks, including travel and accommodation, while visiting civil society organizations across Serbia. All consultant/s costs, including per diems, travel and accommodation expenses, and any other associated costs, must be incorporated into the total proposed gross amount for the consultancy engagement. Consultants will receive a contact list



of organizations from the Representative Office of Helvetas Swiss Intercooperation SRB and/or Civic Initiatives in order to facilitate the process.

## **8. Reporting / Debriefing**

During the implementation period, consultant/s will be in regular contact with representatives of implementing partners: Svetlana Radosavljević (svetlana.radosavljević@helvetas.org) and Ema Štefanac (ema@gradjanske.org).

Representatives of implementing partners, HELNETAS Swiss Intercooperation (HSI) and Civic Initiatives, will organize debriefing meeting with consultant/s at the beginning of their engagement.

Furthermore, implementing partners will organize a meeting after conducting needs assessment and creating the implementation plan in order to clarify the objectives, expected outcomes, and responsibilities of all parties involved.

## **9. Documents**

Documents that should be delivered to implementing partners, HELNETAS Swiss Intercooperation (HSI) and Civic Initiatives, are following:

- **Needs assessment report**
- **Implementation plan**
- **Final report**

Belgrade,

January 13<sup>th</sup>, 2025.



**Annex 2 – APPLICATION PACKAGE**
**APPLICATION FORM**
**1. SUBMITTED by (i.e. the identity of the bidder)**

BIDDER'S INFORMATION	
Name of legal entity	
Registration number	
TIN number	
Address	
Email	
Telephone	
Legal Representative	

**2. CONTACT PERSON (for this application)**

Name	
Telephone	
e-mail	

**Annex 3 – Financial Offer**

Services Items – specifications	Qty- number of consultancy days	Price per unit (consultancy day) in EUR	Total