



# Request For Proposals

## **Hubspot Systems Administrator**

Spokane Independent Metro Business Alliance (SIMBA)

RFP open until filled

Budget: \$15,000

Timeline: Present until May 31, 2023

## About SIMBA

SIMBA is the independent business alliance of the Spokane-Coeur d'Alene metro region. We build a prosperous, equitable, and local economy by organizing and educating regional businesses, consumers, and partners.

SIMBA envisions a connected, interdependent, supportive, and collaborative local economy with shared opportunities, broadened ownership, and unique community character.

## PROJECT OVERVIEW

The purpose of this project is to benefit low-income, underserved, and rural communities by helping businesses that are members of these communities thrive through participation in the Live Local INW Community Marketplace.

Across the Inland Northwest in both urban and rural communities, under-represented and smaller-sized businesses lack reliable, easy-to-use, and values-aligned tools to promote their businesses and products and reach the much larger pool of local-first customers outside their town or county. This is especially noted along the main streets of smaller and rural communities in the region like Colfax, Kettle Falls, Palouse, or Colville. This project will help diverse, local, independent businesses in these areas bridge the rural-urban gap by connecting them with regional market consumers looking for their unique goods and services. It will also support businesses by closing the digital divide that keeps many entrepreneurs limited to Facebook, email, and foot traffic promotion to find, engage, and serve a much larger audience of “good fit” customers.

This Live Local INW Community Marketplace project will create an online and mobile app-powered community marketplace platform that attracts and equitably directs the economic potential of individual consumers, locally-owned businesses, and institutions across Washington State who want an easier way to shop and buy locally.

By expanding our existing commitment to provide the resources and tools for local businesses and business serving organizational partners, this project will make it much easier for regional consumers to support a diverse network of rural and urban microenterprise businesses.

This project will serve to catalyze invaluable opportunities for the newly-formed Business Equity Coalition of the Inland Northwest (BECiN) to strengthen relationships among its coalition members and community partners, and to give regional consumers and institutions another way to strengthen the resilience and equitable representation of our local and regional economies. In addition to the marketplace, the project consists of outreach to partner organizations and local businesses, and grantmaking.

## STATEMENT OF WORK

### Overview

The contractor will work within SIMBA's existing HubSpot and other software program environments to help the organization take full advantage of the newly purchased Pro features and complete centralizing all CRM related data within the HubSpot platform. They will be responsible for supporting and training our Technical Communications Manager as well as other project resources who will be utilizing HubSpot, and will be available to the Systems Director, Tech Coordinator and Campaign Director to help implement data clean up and ongoing integrity efforts and reporting requirements. The selected contractor will have proven experience in managing, creating & supporting agile CRM development initiatives.

### Services

The contractor will provide the following services as part of this project:

	<b>Service</b>	<b>Hours (if applicable)</b>	<b>Cost Subtotal</b>
1	<i>Project Management:</i> Ability to use agile methodologies to iterate through updates and changes within a technical environment. Includes regular use of Asana, Slack and Google Workspace tools. All work products and task management will be maintained in and managed through the client's software systems.		
2	<i>Hubspot Consulting:</i> Maintain and enhance visual layout, workflow rules and business logic layer to streamline and enhance business processes and improve user experience to the satisfaction of regular system users. Ensure system		

	availability and stability by administering and maintaining applications. Define & assign user rights and privileges within the database/CRM system. Document detailed operational procedures and tutorials specific to the organization's needs and that align with and reference other internal operational guidance documents as needed.		
3	<i>Data Integrity:</i> Ensure that all data is accurately updated, complete across platforms and has a protocol for being adequately maintained. Provide oversight and monitoring of data entry & updates. Use system checks for duplicate records when needed, and create practices and procedures that enable the organization to reduce unnecessary data accumulation. Ensure that relevant organizational data is easily accessible for colleagues and that the confidentiality of sensitive contact data is protected.		
4	<i>Reporting:</i> Develop an intuitive reporting and data collection system including but not limited to the following demographic and business contact information needed for completing all Federal contract reports: <ul style="list-style-type: none"> <li>● Number of Small Businesses Served</li> <li>● Jobs Created and/or Retained (if applicable)</li> <li>● Number of Minority Owned Businesses Served</li> <li>● Tribal-owned, Women-owned, and OMWBE Certified Businesses served</li> <li>● Number of and demographics for businesses served</li> <li>● North American Industry Classification System (NAICS) codes of businesses served</li> </ul>		
5	<i>Process Definition and Improvement:</i> Identify business process improvements and related system enhancements for functional use, including improving efficiencies through automated routines to perform tasks within and across platforms.		
6	<i>Training and Management:</i> Develop and provide training on core and advanced system functionality for all end users, maintaining and furthering the knowledge level of staff around use of the database/CRM system. Work with appropriate SIMBA resources to delegate tasks as appropriate and seek assistance and further clarification as needed to keep system improvements being implemented swiftly.		

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# BUDGET AND TIMELINE ACKNOWLEDGEMENT

We want to highlight and provide context for the RFP timeline requirements and budget, which are unique to this opportunity.

This contract is being funded through a special, one-time grant from the Washington State Department of Commerce that was – by design – required to be disbursed and executed in a short timeframe. This timeframe is, by association, reflected in our RFP process.

SIMBA is committed to ensuring that this process is as accessible and supportive for you as possible, given the unique parameters. With that, we welcome questions and conversation, especially if you are perceiving potential roadblocks or need more clarity. Tiffany Harms is our RFP point person and would be happy to check in with you. She can be reached at [team@spokaneindependent.org](mailto:team@spokaneindependent.org) and 253-224-8080.

## EVALUATION METRICS

SIMBA will evaluate bidders and proposals based on the following criteria:

- Previous experience/past performance history.
- Projected costs.
- Experience and technical expertise.
- Bidders must demonstrate the organizational capacity to conduct the work required by this project.
- SIMBA shall grant preference to SIMBA members and partners, in accordance with Federal law.
- SIMBA shall award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of this project.

SIMBA will not pay for travel, lodging, or per-diem unless specifically mandated in the requirements.

## SUBMISSION REQUIREMENTS

Bidders must adhere to the following guidelines to be considered:

- Submissions are to be directed to Tiffany Harms at [team@spokaneindependent.org](mailto:team@spokaneindependent.org).
- Include samples and references with your proposal.
- Proposals should not be more than 10 pages. Failure to comply with this guideline will result in an automatic rejection.
- A proposed schedule must also be included and clearly expressed.
- Include pricing using the table provided above under Statement of Work.
- If you are interested in more than one open RFP opportunity, you must submit a separate proposal for each.

## UEI AND INVOICING REQUIREMENTS

The grant we are working under requires that all vendors possess an active UEI (Universal Entity Identifier) number in order to receive payment. This means that we will need all selected vendors to have a UEI by the first invoicing deadline on April 25, 2023. While this is a no-cost process to complete, it does include multiple steps that we want vendors to have time to move through. To obtain a UEI visit [sam.gov](https://sam.gov). Please don't hesitate to reach out to us if you have any questions.

## CONTACT INFORMATION

For questions or concerns connected to this RFP, please don't hesitate to reach out to:

**Tiffany Harms** (*pronouns: she/her*)

Recruiting and HR Consultant, Juno Collaborative Consulting

Spokane Independent Metro Business Alliance

[team@spokaneindependent.org](mailto:team@spokaneindependent.org) | 253-224-8080