Request for Proposals (RFP)

Salesforce Consultant (Developer/Administrator)
Issued by: Rainforest Trust
Deadline: 9/30/2025

Background

Rainforest Trust is a global nonprofit organization, founded in 1988, with a mission to save endangered wildlife and protect our planet by creating rainforest reserves through partnerships, community engagement, and donor support. We have protected over 50 million acres across 62 countries and raise $45M–$65M annually, with 90% from private philanthropy.

Rainforest Trust completed its migration to Salesforce Nonprofit Cloud (Enterprise Edition) and Marketing Cloud Account Engagement (MCAE) in 2025, with the system going live on July 1. The platform supports the recording of 50,000–60,000 gifts each year, houses more than 57,000 donor records, and serves as a central hub for reporting, income forecasting, and mass outreach.

We now seek a **Salesforce Developer/Administrator** to optimize and stabilize our system to support our donor engagement and fundraising excellence.

Scope of Work

The consultant will deliver **tested, client-ready solutions** against the following priorities:

1. Initial Review & Needs Analysis
- Holistically review NPC and MCAE setup against nonprofit best practices.
- Identify and document unmet core business needs by facilitating requirements gathering meetings with key end users.
- Recommend solutions with specific implementation pathways.
- Draft Scoping Documentation (requirements, acceptance criteria, testing plan)

2. Reporting
- Create and validate template reports for:
  - Gift Transactions (with designations, soft credits, account owner) and able to be filtered by Account Owner, Designation, Business Account Address
  - Portfolio reports of Accounts, Giving Summary, Activities/Tasks/Meetings
  - Portfolio and Full reports of Opportunities with weighted percentages
- Advise & implement structural adjustments (objects/configs) as required to resolve reporting limitations.

3. Automated Receipting

- Adjust OmniStudio receipting system to properly handle hard/soft credits.
- Fix template layout/spacing issues and train the internal team on how to make those adjustments.
- Ensure designation and amounts display correctly at gift level.
- Explore alternative solutions to automate receipting if needed; identify potential batch solutions

4. Activity Tracking & MCAE Sync

- Configure a unified, filterable activity tracking system (Activities, Tasks, Meetings, Events, MCAE emails) to include:
    - Manually entered Activities, Tasks, Meetings & Events
    - Mass emails sent from from MCAE
    - Ensure searchability (keywords, moves, activity owner)
- Map Person Account data to MCAE and build Dynamic Lists segmented by:
    - Past support of specific designations
    - Geography/location
    - Account Owner
    - Donor interests
    - Wealth data
- Build or configure a component in Salesforce that allows the CRM users to view and make changes to the lists their donors are on in MCAE

5. Data Hygiene, Training, and Documentation

- Adjust system settings, train the team, and support documentation of the deduplication process across Accounts, Contacts, and related records
- Build flows to maintain fields on both Business and Related Person Accounts as needed
- Build weekly hygiene reports/processes for monitoring data through automations and reports
- Consultant will provide documentation of all configuration, automation, and integration work performed, including process flows.
- The consultant will provide a 30-day support period after project completion to resolve any defects or errors identified.

Consultant Requirements

- Salesforce Certified Administrator and Salesforce Certified Platform Developer (required).
- Proven expertise in:
    - Salesforce Nonprofit Cloud (NPC, not just NPSP)
    - MCAE (Pardot)
    - (Preferred) Integrating NPC with FundraiseUp
- Ability to act as both strategic advisor and hands-on developer
- Track record of measurable outcomes for nonprofits of comparable scale

- At least two client references demonstrating specific, tested deliverables

Engagement Structure

- **Contract Term**: 2-3 months, independent contractor (individual preferred)
- **Start Date**: October 10, 2025 (target)
- **Budget**: up to $12,000 total
- **Location**: Remote, with overlap to U.S. Eastern Time

Performance Management & Accountability
- Consultant must provide **weekly updates in Asana** (task progress, blockers, next steps)
- Deliverables must be **tested and validated by Rainforest Trust staff** before payment release
  - Testing should include preparation of test scripts, led by the consultant, as well as formal user acceptance testing conducted within a set window identified mutually by the consultant and Rainforest Trust
- Payment will be tied to **results**, not hours worked (Payment Structure can be provided upon request)

Proposal Requirements

Interested consultants must submit:
- Resume/CV and certifications
- Brief description of relevant NPC and MCAE projects
- Confirmation of availability and willingness to provide **weekly Asana updates**
- A results-based project plan or work approach
- At least two client references (with contact details)
- (Optional) Sample deliverables or technical work

Submission Instructions

- **Deadline**: 9/30/2025, 5:00 pm ET
- **Submission Contact**: taylor.wicker@rainforesttrust.org
- **Submission Process:**
  - Proposals should be submitted in PDF format via email with the subject line: Salesforce Consultant.
  - Proposals will be accepted by email to the address above until Sep 30, 2025, 5:00 pm ET

Evaluation Criteria

Proposals will be evaluated on:
- Salesforce certifications and technical expertise
- Demonstrated success in NPC/MCAE projects.
- Quality and clarity of proposal
- Strength of results-oriented approach

- Ability to provide daily accountability through Asana
- Client references confirming timely delivery of tested solutions.
- Availability to meet Rainforest Trust's needs within the proposed timeline and budget

This Request for Proposal represents the requirements for an open and competitive process. This request does not commit Rainforest Trust to award a contract, to pay any costs incurred in the preparation of the proposal, or to procure or contract for services or goods. All respondents to this RFP shall indemnify and hold harmless Rainforest Trust and any of their officers and employees from all suits and claims alleged to be a result of this RFP. Rainforest Trust reserves the right to determine, at its sole discretion, whether any aspect of a respondent's proposal meets the criteria in this RFP.