



## REQUEST FOR PROPOSALS

### SOUTH ARTS SEEKS A CONTRACTOR FOR SALESFORCE

South Arts (SA), a nonprofit, regional arts organization for the south, is seeking a consultant to assist with setting up grant forms and data migration in its newly implemented Salesforce GMS instance. SA requires someone with knowledge of Salesforce, Formstack for Salesforce, Conga for Salesforce, and experience with data migration.

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#### Scope of Work:

- GMS System Work:
    - Build Funding Request fields and page layouts in South Arts Salesforce instance
    - Create application and report forms using Formstack for Salesforce for grant programs
    - Complete tests with Program staff, get feedback, and adjust forms as needed
    - Ensure functionality of forms in South Arts Salesforce Experience Grantee Portal
    - Build Conga letters and PDFs
  - Data Migration
    - Perform collection, integration, and audit of data from multiple sources to ensure completeness
    - Evaluate data quality and perform data-cleaning operations for import into Salesforce
    - Validate data sets to ensure data consistency and internal requirements are met
    - Perform technical validation of extracted and uploaded data to Salesforce and manage source to target data mapping
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#### Required Skills:

- Working knowledge of Formstack for Salesforce, Community Forms
- At least 3 years experience in Salesforce
- Working knowledge of Salesforce objects, page layouts, fields, and relationships
- Working knowledge of Conga Composer and Sign
- Understanding of Salesforce GMS app, Grantee Portal, and Formstack Community Forms integrations
- Knowledge of grants management and database systems
- Experience with data importing/exporting, cleansing, and mapping

#### Deliverables:

Tested and fully functional applications, report forms, letters, and PDFs  
Successful and validated data migration projects  
As approved by the Director, Database & Technology

#### Timeframe:

Ongoing, as needed  
Start Date: As soon as possible

**Proposals:**

No specific format is required for a proposal. Proposals should include the following:

- Your proposed approach to assessment, evaluation, and anticipated deliverables
- Your relevant experience with Formstack for Salesforce & Salesforce GMS
- Any further information that would help South Arts understand your proposal
- Your proposed fee/budget (inclusive of all expenses)
- Resume
- Three references

Please send any questions or submissions to Cathy Lee, Director, Database & Technology, at [clee@SouthArts.org](mailto:clee@SouthArts.org).

***Proposal for Contracted Services should be sent to: [clee@southarts.org](mailto:clee@southarts.org)***

**About South Arts:**

South Arts is a nonprofit regional arts organization. Our mission: advancing Southern vitality through the arts. South Arts was founded in 1975 to build on the South's unique heritage and enhance the public value of the arts. Our work responds to the arts environment and cultural trends with a regional perspective. South Arts offers an annual portfolio of activities designed to support the success of artists and arts providers in the South, address the needs of Southern communities through impactful arts-based programs, and celebrate the excellence, innovation, value, and power of the arts of the South. For more information about our grantmaking, conferences/convenings, and other programs supporting artists, arts organizations, and communities, visit [www.southarts.org](http://www.southarts.org).

**Equity Statement:**

South Arts is an inclusive employer and adheres to Equal Employment Opportunity Commission standards. South Arts does not and shall not discriminate on the basis of race, color, ethnicity, national origin, religion, age, disability, genetic information, gender, gender expression, sexual orientation, pregnancy, marital status, military status, economic status, or geographic location in any of its activities or operations.