



REQUEST FOR PROPOSAL (RFP)

Centralised Contact & Donor Relationship Management (CRM) Solution

2026-10 P0072

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I. SUMMARY OF DEADLINES

The timeline for the RFP process is set out below. While Geneva Call does not anticipate changes to this timeline, it reserves the right to adjust it as needed; any changes will be communicated to all applicants.

Milestone	Date
RFP Launch Date	06/10/2026
Deadline for Receipt of Proposals	02/11/2026
Anticipated Award of Contract	09/11/2026
Anticipated Start of Service	<i>As soon as possible</i>

As part of the selection process, Geneva Call reserves the option to request clarifications regarding proposals that substantially qualify. Any such questions are at Geneva Call's discretion and will only be directed to applicants who have submitted substantially responsive proposals.

Final award is subject to the terms and conditions included in this RFP.

II. ORGANISATION BACKGROUND

Geneva Call is issuing this Request for Proposal (RFP) and will be the administrative lead organisation for this process.

Geneva Call is an international non-governmental humanitarian organisation committed to protecting civilians in armed conflict by strengthening respect for humanitarian norms and principles among armed groups and de facto authorities (AGDAs). Founded in 2000, Geneva Call is registered as a Foundation under Swiss law.

More information about the organisation is available at www.genevacall.org.

III. SCOPE OF SERVICES

Purpose

The **general objective** of the RFP is to select a qualified vendor to design, configure, implement and support a secure cloud-based Customer Relationship Management (CRM) solution that will serve as Geneva Call's centralised contact database for use by staff across the organisation.

Objectives

The **specific objectives** of the project are threefold:

- **To establish a single shared source of accurate up to date information concerning Geneva Call's engagements with its contacts and essential information about them**, that allows Geneva Call to efficiently capture, categorise, retrieve and maintain contact and organisational information, while preserving relationship history and institutional knowledge.
- **To strengthen relationship management and institutional engagement** by enabling staff to access and share relevant information on existing relationships, record interactions, identify and target relevant contacts, and support engagement activities such as meetings, missions, events and targeted communications.
- **To provide a secure, user-friendly and scalable CRM solution** that supports organisational reporting and analysis and integrates with Geneva Call's existing systems (whatever their nature and level of technicity) and Microsoft 365 environment, while ensuring appropriate data security, maintainability and accessibility for organisation-wide use.
- **To support institution-wide fundraising efforts** by facilitating the tracking of funding opportunities (donor interests and funding priorities), donor applications (from initial concept notes to full proposals), and their assessed likelihood of conversion; whilst supporting associated workflows and follow up by staff on associated designated tasks, and analysis of factors effecting success rates.

Scope of work, deliverables and milestones

While developing their proposal, the vendor would have to consider the following elements.

CRM users

The CRM is intended for the following categories of users:

- **Primary users:** Colleagues located in Geneva Call offices in different countries and regions with the ability to view, create and edit. (Approximately 50 users.)
- **Secondary users:** Colleagues located in Geneva Call offices in different countries and regions with limited/segregated read-only access. (Approximately 150 additional users.)

The CRM should support role-based access rights, allowing Geneva Call to define different levels of access to information and functionalities according to users' roles and responsibilities (see parts on security requirements and access rights) CRM functional requirements.

Processes, roles and responsibilities

While developing its proposal, the vendor should include a dedicated section on how the CRM is to be managed and governed in practice. This should cover the processes, roles and responsibilities associated with the CRM, including who is responsible for updating and maintaining the information,

who manages the system, who is responsible for data analysis, and who will use the CRM and its outputs.

Contact and Organisation Management

The CRM should:

- Maintain individual contact records and organisation/institution records, with the ability to link multiple contacts to the same organisation.
- Support the following core contact information: **full name, title/position, team, unit, organisation name, email address, phone number(s), mailing address, country/region, language of correspondence, contact type, owner, confidentiality level and all the standard fields expected from a CRM.**
- Support organisational and relationship context including stakeholder category/type, Geneva Call organisational unit responsible for the relationship, links to other contacts in the same organisation, notes on previous interactions and key points discussed, preferred communication channels, and related project(s) or thematic area(s).
- For donor contacts, allow the individual to be linked to relevant Geneva Call donor grant code(s) synchronised from MS 365 Business Central.
- Maintain administrative information including date of creation, date of last update and responsible Geneva Call staff member.
- Use predefined and configurable values for stakeholder category/type rather than unrestricted free-text entry.
- Where projects or thematic areas are maintained in the CRM, use structured/predefined values where practical and proportionate to the benefit of maintaining the information organisation-wide.
- Support standard CRM data-quality functions such as duplicate detection and controlled merging of duplicate records.
- Maintain record ownership/responsibility and an audit history of relevant record changes.

Technical requirements

Contact Capture, Import and Export

The CRM should:

- Allow contacts to be created and updated manually.
- Allow bulk import and export using Excel, CSV or equivalent standard formats.
- Provide the ability to import/export contacts directly from/to Microsoft Outlook or through an appropriate Microsoft 365 integration.
- Business card scanning or equivalent mobile contact capture is considered a nice-to-have functionality.

Contact Search and Verification

The CRM should:

- Provide fast and intuitive search across individual contacts and organisations.
- Allow users to search and filter by relevant information such as **name, organisation, email, country/region, stakeholder category/type, role/position, responsible staff member, related project/thematic area** and **donor grant code** where applicable.
- Support contact verification before engagement and help prevent the creation of duplicate records.



Targeted Communication and Distribution Lists

The CRM should allow Geneva Call to easily:

- Create segmented contact lists for newsletters, annual reports, events, project updates, advocacy campaigns and other targeted communications.
- Filter and segment contacts using relevant CRM fields.
- Allow users to tag or record specific groups, distributions or mailings in which a contact has been included.
- Allow contact lists to be exported or otherwise used with Geneva Call's communication tools.

Interaction History and Relationship Management

The CRM should:

- Record meetings, calls, correspondence and relevant notes against a contact and/or an organisation.
- Retain the date, participants and key points of relevant interactions.
- Make interaction history available to authorised users to support continuity when staff members change roles or leave Geneva Call.
- Link contacts within the same organisation to provide visibility of the relationship network and organisational structure.
- Visual relationship mapping or organisational chart functionality is considered desirable where it can be maintained without disproportionate administrative effort.
- Management of the Donor funding applications, including targets, probability and signed grants. The information is already available in our ERP, MS 365 Dynamics Business Central and should be synchronised directly from there.
- Record tasks/next steps with reminder system in Outlook.

Event and Mission Planning

The CRM should:

- Prepare targeted contact lists by region, sector, stakeholder category/type, role/position or other relevant CRM criteria.
- Support preparation for official visits, donor missions, events and country-level engagement.

Reporting and Strategic Analysis

The CRM should:

- Provide standard CRM reporting and filtering capabilities on contacts, organisations and interactions.
- Allow analysis by relevant fields such as stakeholder **category/type, organisation, country/region, responsible staff member, project/thematic area** and **donor information** where applicable.
- Strategic network analysis to identify stakeholder gaps, overlaps and opportunities for partnerships, advocacy or fundraising is considered desirable, provided that the functionality is realistic to implement and maintain organisation wide.

User Interface

A strong, intuitive and easy-to-navigate user interface is a key requirement. The proposed solution should allow standard users to search, create, update and review contact and interaction information with limited training and a reasonable number of steps.

Data Migration and Data Quality

- The vendor should propose an approach to migrate existing contact information from Microsoft Outlook, Excel lists and other structured contact lists identified during the project.
- The migration approach should include data mapping, cleansing, duplicate identification, validation and user acceptance before final migration.
- The solution should support data quality through required fields, controlled lists where appropriate, duplicate detection and clear record ownership

CRM Architecture & Microsoft Integration

The CRM should be designed in connection with the other systems (whatever their nature and level of technicity) already in place within the organisation, in order to ensure comprehensive data and analysis and, importantly, to avoid creating separate or redundant tools and parallel sources of information.

Vendors must propose a cloud-based CRM solution suitable for Geneva Call's Microsoft 365 environment. The solution should be secure by design, scalable, cost-efficient and maintainable.

- Integration with Microsoft Outlook / Microsoft 365 for contact-related workflows.
- Integration with Microsoft Dynamics 365 Business Central, where applicable, particularly to reference or synchronise relevant donor and grant information, including Geneva Call donor grant codes and Accounting dimensions.
- Standard import/export capabilities using Excel or CSV.
- Availability of standard APIs or connectors for future integrations should be described by the vendor.
- The vendor should describe which integrations are available natively, through configuration, through custom development, or require additional licensing.

Security Requirements (Critical)

Security is a key evaluation criterion. In that sense, the CRM should take into account the following:

Identity & Access Management

- Integration with Microsoft Entra ID (Azure Active Directory) for authentication and Single Sign-On (SSO).
- Role-Based Access Control (RBAC).
- Least-privilege access model.
- Appropriate separation of administrative and standard user permissions.

Data Security

- Encryption at rest.
- Encryption in transit.
- Appropriate backup and recovery mechanisms.

Compliance & Auditing

- Logging and auditing of data access and relevant administrative actions.
- Support for compliance with applicable regulations, including GDPR and nLPD.
- Data residency transparency.
- Geneva Call must retain ownership of its CRM data and be able to export the data in a usable standard format.

CRM Reporting & Access Control



Reporting Requirements

- The CRM should provide standard views, filters, lists and reporting capabilities for contact and organisation management.
- The vendor should describe available dashboards and reporting functionality included in the proposed solution.
- The vendor should describe whether reporting can be integrated with Microsoft Power BI if required in the future.

Access Restrictions

- CRM access, including access to reports and sensitive information, should follow the role-based access model defined under Section III M.
- The solution should support appropriate restrictions for different user profiles and sensitive information.
- Permissions should be centrally manageable and should not rely on hardcoded individual users.

Non-Technical requirements

Requirement	Expected Capability
Availability	High availability, cloud-hosted
Performance	Responsive search, filtering and record access
Scalability	Easy to add users, contacts, organisations and future functionality
Maintainability	Well-documented and easy to support

Training, Support & Maintenance

- Provide training to key users following the train-the-trainer model.
- Provide administrator training and knowledge transfer sufficient for Geneva Call to manage standard configuration and user administration.
- Provide an ongoing support model.
- Provide SLA details, including response and resolution times.
- Provide monitoring and service availability information where applicable.
- Provide an optional managed services offering, if available.
- Provide technical and user documentation.

III. INSTRUCTIONS FOR RESPONDING

This section addresses the process for responding to this solicitation. Applicants are encouraged to review it carefully before completing their responses.

A. Point of contact

Email: rfp@genevacall.org

B. Financial and technical proposal

Applicants are required to submit to Geneva Call both a technical proposal that meets the defined scope of work, and a detailed financial proposal including a comprehensive budget.

Financial proposal requirements:



- Cost breakdown
- Payment schedule
- Additional expenses
- Budget justification
- Currency
- A proof of registration
- Management CVs
- Indicators of the company's financial stability (e.g. liquidity ratio, debt-to-equity ratio, profitability)

C. Submission

Please divide the offer into two separate proposals — the financial proposal and the technical proposal — and submit them no later than 02/11/2026 to the address below:

Geneva Call

47 chemin de la Chevillarde, CH-1224 Chêne-Bougeries, Geneva, Switzerland

And/or to the following email addresses:

- Financial proposal: **rpfinance@genevacall.org**
- Technical proposal: **rfp@genevacall.org**

D. Unacceptable proposals

The following proposals will automatically not be considered or accepted:

- Proposals received after the RFP deadline (no later than 23:59, Geneva time)
- Incomplete proposals

E. Acceptance

Geneva Call will not necessarily accept the lowest-cost proposal or any of the proposals submitted. Eligibility requirements, evaluation criteria, and mandatory requirements (see Chapter IV) shall govern the selection.

F. Completion

- It is the applicant's responsibility to understand the requirements and instructions specified by Geneva Call. If clarification is necessary, applicants should contact the point of contact above prior to submission.
- By responding to this RFP, the applicant confirms its understanding that failure to comply with any RFP condition may result in disqualification.

G. Right of rejection

Geneva Call reserves the right to reject any or all submissions, or to cancel or withdraw this RFP at any time and at its sole discretion, without incurring any cost or liability for costs or damages incurred by any applicant, including expenses incurred in preparing the submission.

H. References

Geneva Call reserves the right, before awarding the contract, to require applicants to submit evidence of their financial, technical and other qualifications, and to contact the individuals or organisations provided as references to verify the information submitted.

IV. TERMS AND CONDITIONS OF THE SOLICITATION

A. Notice of non-binding solicitation

This RFP is not, and shall not be considered, an offer by Geneva Call. Geneva Call reserves the right to reject any or all proposals received in response to this solicitation and is in no way bound to accept any proposal. Geneva Call additionally reserves the right to negotiate the substance of successful applicants' proposals, and to accept partial components of a proposal if deemed appropriate.

Geneva Call maintains a zero-tolerance approach to fraud, corruption, collusion, bribery, and other prohibited practices. Any such conduct may result in the rejection of a proposal, disqualification from the procurement process, termination of negotiations, or contract termination.

B. Bid validity

Proposals are expected to be binding for a period of ninety (90) days from the published response date, and shall remain valid until a contract is signed, subject to Geneva Call's terms and conditions.

C. Confidentiality

All information provided as part of this solicitation is considered confidential. Should any information be inappropriately released, Geneva Call will seek appropriate remedies as allowed. Proposals, discussions and all information received in response to this solicitation will be held as strictly confidential. Geneva Call also reserves the right to require any bidder to enter into a non-disclosure agreement.

D. Bid preparation costs

Geneva Call reserves the right to amend this RFP and will communicate any updates to all applicants. Applicants are solely responsible for any costs incurred in preparing and submitting their response.

E. Right to final negotiations

Geneva Call reserves the right to negotiate the final costs and final scope of work of the proposal, and to limit or include third parties, at its sole and full discretion, in such negotiations.

F. Eligibility and mandatory criteria

- Vendor must be legally registered
- Vendor must demonstrate financial capacity to perform the contract.
- Vendor must have adequate management and organizational capacity to deliver the services.
- Applicants must disclose any actual, potential, or perceived conflicts of interest that could affect their participation in this solicitation
- Applicants may be required to confirm compliance with applicable sanctions regulations and screening requirements
- Relevant references demonstrating experience delivering comparable services.

G. Evaluation criteria

Proposals will be reviewed by a Review Committee against criteria that include, but are not limited to:

[Review qualifications if they apply to in case of service or good]

- Understanding of the scope of work and of the technical requirements of this RFP



- Quality of the proposed technical and methodological approach, and evidence of relevant experience
- Comprehensiveness and feasibility of the proposed work plan and timeline
- Detailed budget and cost-effectiveness of the proposed approach
- Qualifications and experience of the proposed management and personnel
- Anticipated challenges and opportunities in undertaking the work

H. Performance and financial review

Performance review. In addition to internal measures of performance, Geneva Call retains the right to require independent evaluation of the Contractor's performance, including through third-party audits of contract service levels. The Contractor will cooperate fully with any such audit and agrees that information shared with Geneva Call may be shared with the third-party auditor.

Financial audit. Geneva Call requires the Contractor to retain all financial documents related to the contract's costs and revenues for the standard financial data retention period applicable in its country of incorporation.

I. Communications and conduct

Geneva Call does not represent, warrant, or act as agent for any third party as a result of this solicitation. This solicitation does not authorise any third party to bind or commit Geneva Call in any way without Geneva Call's express written consent.

All communication regarding this solicitation shall be directed to the appropriate point of contact at Geneva Call. Contacting third parties involved in the RFP, the review panel, or any other party may be considered a conflict of interest and could result in disqualification of the proposal.

J. Contract term and termination

Term of agreement. The Agreement resulting from this solicitation shall correspond to the period of design, configuration, implementation and support of the secure cloud-based Customer Relationship Management (CRM) solution.

Termination. Geneva Call may terminate the Agreement, or any services under it, without prejudice to any other rights or remedies, by giving ninety (90) days' written notice to the Contractor.

K. Intellectual property

Subject to the terms of the contract to be concluded, ownership of the intellectual property related to the scope of work — including technical information, know-how, processes, copyrights, models, drawings, source code and specifications developed by the applicant in performance of the contract shall vest entirely with Geneva Call.

L. Data protection

Where the services involve the collection, access to, storage, transfer, or processing of personal data, the successful applicant shall comply with all applicable data protection legislation and Geneva Call's data protection requirements.

The successful bidder may be required to comply with relevant Geneva Call policies, including anti-fraud, safeguarding, data protection and code of conduct requirements.

M. Scope of change



Once the contract is signed, no increase in Geneva Call's liability or in the fees payable for the services resulting from any change, modification or interpretation of the documents will be authorised or paid unless it has received Geneva Call's express prior written approval.