



INTERNATIONAL INSTITUTE FOR DEMOCRACY AND ELECTORAL ASSISTANCE

ANNEX B

TERMS OF REFERENCE

1. **Background**

International IDEA currently has no CRM system, which prevents the organization from effectively tracking contact information, touch points in the organization, and relationship history. There is also a real challenge of coordination across the organization when multiple people are tasked with fundraising and donation management. As information is not centrally managed the organization risks losing institutional knowledge on relationships.

The institution’s ERP system (Unit 4 UBW) currently stores information on some of the needed items for fundraising, including document management of grant agreements, invoicing and reporting. UBW also includes a pre-award functionality that has an option to upload information on prospect funding opportunities, with basic information about the donor(s), funding modalities and overall details about a particular fundraising effort.

However, the ERP system lacks the ability to include contacts details, reference documents and institutional track records of engagement with different kinds of donors and partners. This data is currently stored in Excel sheets around the global institution, in emails or in employee memory. What is needed is earlier-stage prospect, partner and constituent management system to track basic data, to record meeting interactions and follow-up items, to track relationships & conversations, to manage event invitations and content dissemination to critical audiences, as well as to continue cultivation.

2. **Objectives of the Assignment**

- To obtain CRM system licenses
- To design, configure, set-up and implement the CRM based on International IDEA needs and support data migration as needed
- To train staff in its use

3. **Scope of Work**

Functionality Checklist (to be included in the proposal)

Language requirements: English

Geographic area covered: Global

CRM Solution (8 criteria)		
Function/Service Needed	Provided by bidder? Yes/No	Bidder Comments
<p>1. Constituent management</p> <p>This is the most essential feature of CRM software. Constituent management can include Member States, Board Members, public and private donors, partners, academic contacts, media, former IDEA staff members, and other groups.</p> <p>Needed Tools:</p> <ul style="list-style-type: none"> • basic contact details • relationship history (meetings, conversations, interests) • key account manager/assigned staff members working with contact to avoid overlap and fatigue • activity tracking and follow up (e.g. call reminders for the future assigned to self or others, automatic reminder sent) 		

<ul style="list-style-type: none"> • event attendance • Interest areas (e.g. tag topics of interest in each record) • donation history and notes about donation preferences/giving records • groups – Board, Former Board, Council, Former Council, former employee, etc 		
2. Email automation synch with Outlook and synch with MailChimp – Provide explanation of how this synch occurs in the proposed solution (e.g. how does new constituent information, notes and follow up actions get from Outlook to proposed CRM – is there an automated functionality), what information is possible to synch, and if this is automated and already included in the solution proposed		
3. Lead management - Manage the process of converting prospects into potential donors (leads) by identifying, scoring, and moving leads through the grant pipeline		
4. Reporting and analysis - Summary reports of secured grants or leads performance giving insights into performance and donor behavior.		
5. List segmentation to divide supporters into different groups e.g. by events attended, projects of interest, geographic areas of donation, etc.		
6. Event Manager - event planning and management – allows us to schedule events, send invitations, track RSVPs, and synchs with the constituent record so we can see who is attending what events for follow up and cultivation. Can be used to send surveys for event feedback as well.		
7. GDPR compliance documentation/support. This is a mandatory requirement and solutions that are not GDPR compliant will not be considered		
8. Ongoing technical support/help desk package: Availability of day-to-day trouble shooting and support (e.g. email accessible help desk embedded in CRM to allow quick trouble shooting)		
Technical and Security Requirements (13 criteria)		
Technical requirements		
1. Cloud based		
2. Globally accessible		
3. Automated synch with MailChimp		
4. Automated synch with Outlook		
5. Future integration with ERP UBW Unit 4 feasible (Note: ERP integration will not be done during the CRM implementation project, but likely to be done in a follow-up phase 2 implementation. Must ensure compatibility with ERP UBW Unit 4 is feasible during this phase 1 procurement process)		
Security requirements -CRM software contains valuable and sensitive customer information. With cloud-based security environment, platform should guarantee:		
6. Protection of customer information at rest, in use and in-motion with secure technologies accordingly.		
7. Prevention of phishing and malware attacks.		

8. Secure authentication to ensure access to authorized users only.		
9. Continuous Monitoring of hosting environment and application.		
10. Process Compliance (Legal, regulatory, standards) e.g. GDPR.		
11. Application availability – Performance of the CRM application and data-retrieval process to always perform optimally.		
12. CRM backup, and disaster recovery for business continuity		
13. Data Transfer process in the event of migration to a new platform or provider.		
Implementation of CRM (8 criteria)		
1. Undertake discovery process to understand International IDEA processes and needs, further develop process maps		
2. Collaborate with International IDEA to plan and design the customization of CRM		
3. Build and configure system to meet International IDEA's needs and process		
4. Assist International IDEA in data migration from Excel sheets to CRM		
5. Deploy and train CRM system via Train-the-trainer		
6. Provide International IDEA technical documentation of the solution		
7. Provide change management advisory and scalability options (refer evaluation and scaling below)		
8. Provide optional support package after deployment for trouble shooting, additional configuration needs that develop after initial implementation		

4. *General requirements for personnel/implementation provider*

- CRM implementation firm that is official partner of CRM system provider
- Track record of CRM implementation in NGOs or public agencies
- Strong reputation as quality implementation team, as evidenced by past performance and references
- Full fluency in English
- Preferable if there is the option to provide onsite training in Stockholm, but not a requirement

5. Timing and Work Plan

Timeline

- Procurement: January-February 2022
- Implementation: February 2022 – April 2022
- CRM Go-live estimated date April-May 2022

Installation & Training

- A steering committee (CRM Task Force) will support installation, determine licenses and oversee training. The steering committee is composed of Staff Members at International IDEA and the successful service provider.

- Training and use will be limited to a small group initially to structure the database appropriate and establish norms. Likely limit to 15-20 licenses to start.

Evaluation & Scaling

- After one year of implementation, the steering group will evaluate implementation and progress.
- Steering group to determine if and how to scale the database beyond the initial users and maintaining a training program as needed.

6. **Deliverables Requirements**

The deliverable is deployment and go-live of a CRM system with all requisite technical documentation of the solution as well as staff training in the use of the system.

What constitutes approval or acceptance of a final system ready for deployment will be jointly agreed with the implementation provider during discovery phase of the project and will be approved by International IDEA's project lead. Timing of this deployment will be determined during the discovery phase based on implementation best practice, but we expect the implementation process from discovery to go-live to take 4-9 weeks.

7. **Management and Organisation**

A steering committee at International IDEA (CRM Task Force) will support installation, determine licenses and oversee training. The steering committee is composed of members of the External Relations team in the Secretary-General's office (SGO) in consultation with IT Steering group and key users in the regions and program teams

Training and use will be limited to a small group initially –to structure the database appropriate and establish norms. Likely limit to 15-20 licenses to start.

Focal point is the External Relations and Governance team in the Secretary-General's office

8. **Monitoring and Evaluation**

1. System designed and implemented according to International IDEA's needs and in compliance with technical specifications
2. Go-live and roll-out, including training, delivered within the estimated timing
3. Templates and guidance for data migration provided to facilitate process at all levels within International IDEA
4. Increased availability of information and tracking data on relations with donors and partners