

## Schedule of Requirements

### 1. Background

The United Nations Office for Project Services (UNOPS) is an operational arm of the United Nations, supporting the successful implementation of its partners' peacebuilding, humanitarian and development projects around the world. Mandated as a central resource of the United Nations, UNOPS provides sustainable project management, procurement and infrastructure services to a wide range of governments, donors and United Nations organizations. With over 8,000 personnel spread across 80 countries, UNOPS offers its partners the logistical, technical and management knowledge they need, where they need it. By implementing around 1,000 projects for our partners at any given time, UNOPS makes significant contributions to results on the ground, often in the most challenging environments.

UNOPS based in Geneva, Switzerland, the Europe and Central Asia Regional Office (ECR) UNOPS offices in the region, providing management and financial/programmatic oversight of Global and Country specific Portfolios, Clusters and Operations Centers including hosting services, fund management, management advisory services, implementing projects, procuring goods and services and managing human resources.

The SDG Lab is a multi-stakeholder initiative that accelerates the implementation of the 2030 Agenda by leveraging the expertise of SDG-practitioners in Geneva into policy, practice and action. The Lab does so by cultivating a space for practitioners to experiment with innovative forms of collaboration, methods and tools to strengthen SDG implementation.

### 2. Justification

The SDG Lab requires support from a Salesforce consultant to integrate multiple types of surveys into its Salesforce CRM database to collect data that can address the indicators and questions within the SDG Lab's logical framework for reporting on impact. The outcome of this project will be to improve the existing technology of the Lab's Salesforce database and to streamline the Lab's data management procedures and reporting outputs. This project will consist of the three following lots:

- **Lot 1:** An analysis of the SDG Lab's existing surveys and processes with recommendations for survey tools integration and solution design.
- **Lot 2:** Implementation of the agreed upon solution, including testing and training of SDG Lab staff and rollout support. The execution of this lot will depend on an assessment by the SDG Lab of the deliverables in lot 1, after which a decision will be made on the need of the Lab to go forward with the implementation of the proposed design.
- **Lot 3:** Ongoing monthly support, starting the date of signature of the contract, for the use of the SDG Lab's CRM Salesforce system till the end of 2022. The estimated need is 5 hours of support per month.

### 3. Objectives and Outputs

The table below details the deliverables and outputs for each lot. The consultant is expected to submit a work plan, including timeline and budget for each of the three lots:

Lot	Deliverables	Output	Due
1	Scope of work report including an analysis of the SDG Lab's existing surveys and processes and provide a solution design for survey tools focused on the SDG Lab's logical framework needs, including documenting the requirements for	1) Overview of the SDG Lab's current processes to understand the various surveys' data structure and flow within the SDG Lab's CRM system	2 months after the signature of the contract by the provider.

	the survey integration in the existing CRM database.	<p>2) Mapping of the existing survey questions across the various SDG Lab's surveys to the Salesforce data structure.</p> <p>3) Survey tools analysis, factoring in the ease of integration in the SDG Lab's CRM system as well as existing survey's tools and end user capability.</p> <p>4) Submission and presentation of solution design for feedback.</p> <p>5) Suggested implementation plan for the recommended solution (including cost and timeline)</p>	
2	Implementation of the agreed upon solution to address the SDG Lab's needs identified in the analysis (deliverable 1), including testing and training of SDG Lab staff and rollout support. The execution of this lot is subject to the review and analysis conducted in lot 1	<p>1) Configuration of third-party survey tool</p> <p>2) Testing and deployment of the solution into the SDG Lab's CRM system</p> <p>3) SDG Lab Key users training supplemented by written documentation.</p> <p>4) Initial rollout support to cover troubleshooting and training.</p>	3 months after the signature of the contract by the provider.
3	Ongoing Salesforce support on an "as-needed" basis from the date of signature of the contract.	1) Ongoing support to troubleshoot system errors and provide general user support encountered by the SDG Lab staff in using the Salesforce system. The estimated need is 5 hours per month.	Ongoing support from the date of signature of the contract till the end of 2022.

#### 4. Activities

Activities include but are not necessarily limited to the following tasks:

- Lot 1 activities:
  - o Conducting an analysis of the SDG Lab's existing surveys and processes, including survey mapping and data flow diagrams.
  - o Documenting the requirements for the survey integration in the existing Salesforce CRM database.
  - o Designing a solution for survey tools focused on the SDG Lab's logical framework needs including.
- Lot 2 activities:
  - o Implementing the design solution and overseeing project progress and provide updates for full project,
  - o Testing and deploying the solution, including troubleshooting
  - o Conducting training for SDG Lab key users
- Lot 3 activities:
  - o Providing ongoing Salesforce support for troubleshooting system errors and general user support on an as-needed basis, starting from January 2022 until the end of 2022. (Estimated

to be 5 hours per month).

### Management

The provider is expected to maintain proactive communications with the designated focal person from the SDG Lab and provide updates on the development of various activities. This could include scheduling weekly meetings or sending regular updates via email.

### Knowledge Sharing

Establish a knowledge sharing system to ensure that knowledge and contacts developed through the project is transferred to the SDG Lab.

### Decision Optimization and Recommendation

Completion of the Scope of Work report for lot 1 will help the SDG Lab in its strategic decisions on whether to advance with lot 2 mentioned in this tender. In other words, SDG Lab would start implementing Lot 01 and 03 immediately upon signature of the contract, whereas implementation of Lot 02 will depend on the outcome of Lot 02, availability of the funds and satisfactory performance of the Contractor.

### Complete Final Report and Presentation

The final report shall provide an overview of the progress report, results, and any proposed and ongoing partnership agreements (A final report should be submitted for lot 1 and lot 2).

## 5. Qualifications of the provider

Lot	Experience Requirements
01	Minimum of three years experience in project management processes and evaluating projects in complex and intercultural settings is required
	Minimum of three years' experience in setting-up, implementing and managing Salesforce CRM system solutions is required
	Demonstrated experience in setting-up Salesforce CRM systems for organizations working in the area of Sustainable Development Goals, is desirable
	Minimum of three years experience in advising organizations in setting-up operational frameworks and results-based monitoring systems is required
	Minimum of three years experience in the analysis and development of integration tools for Monitoring and Evaluation with Salesforce CRM system is required
	Extensive experience in workshop facilitation and using creative and agile facilitation techniques, including facilitation of remote e-discussions, to produce actionable outcomes and recommendations is required
	Knowledge of the Geneva 2030 Ecosystem or equivalent is desirable

Lot	Experience Requirements
02	Minimum of three years experience in project management processes and evaluating projects in complex and intercultural settings is required
	Minimum of three years' experience in setting-up, implementing and managing Salesforce

	CRM system solutions is required
	Minimum of three years experience in advising organizations in setting-up operational frameworks and results-based monitoring systems is required
	Minimum of three years experience in the analysis and development of integration tools for Monitoring and Evaluation with Salesforce CRM system is required
	Extensive experience in workshop facilitation and using creative and agile facilitation techniques, including facilitation of remote e-discussions, to produce actionable outcomes and recommendations is required
	Knowledge of the Geneva 2030 Ecosystem or equivalent is desirable

Lot	Experience Requirements
03	Minimum of three years' experience in setting-up, implementing and managing Salesforce CRM system solutions is required
	Knowledge of the Geneva 2030 Ecosystem or equivalent is desirable

## 6. Qualification of key personnel

The qualifications of key personnel applicable for each lot is mentioned in the below table.

Personnel title	Number of personnel	Qualifications	Applicable Lots
Consultant	Maximum 04 personnel	A Master's Degree in a relevant field with minimum 5 years of experience or a Bachelor's degree combined with 7 years of experience	Lot 01 and 02
Consultant	Maximum 04 personnel	Recognized certification in facilitation techniques and in leading meetings, workshops, seminars and other processes aimed at reaching a shared team objective	Lot 01 and 02
Consultant	Maximum 04 personnel	Certified Salesforce provider in the following certificates: administrator; platform app builder; platform developer; Data Architecture and Management Designer; Service Cloud Consultant; Sales Cloud Consultant	Lot 01, 02 and 03
Consultant	Maximum 04 personnel	Fluency in English	Lot 01, 02 and 03

## **7. Contract Modality**

UNOPS intends to establish a Contract for Professional Services with unit priced items only for services required by SDG Lab. The standard template of the Contract for Professional Services is attached under documents tab Section IV of this tender.

## **8. Additional notes:**

The contractor must adhere to the timeline and be able to guarantee the delivery of products and services in accordance with the terms of reference (requirements). The SDG Lab will provide the consultant with access to existing surveys, data collected and reports.

## **9. Billing and Payment**

The Contractor will send an invoice after submission of deliverables to the United Nations Office for Project Services, Geneva Office.

The invoice shall include the purchase order, number, and date of delivery, unit price and total amount. UNOPS will process the payments within 30 days of receipt of the invoice.