

Section II: Schedule of Requirements

Terms of Reference

Podio Customization Consultant Services

Background

Sustainable Energy for All (SEforALL) is an International Non-Governmental Organization operating a world-wide multi-stakeholder platform focused on the delivery of Sustainable Development Goal #7 (SDG7). Launched as an initiative of the United Nations (UN) in 2011 by the Secretary General of the UN, Ban Ki-Moon, SEforALL is widely acknowledged for its achievement in raising global awareness of the world's sustainable energy challenges and ensuring they were included in the UN's Sustainable Development Goals. SEforALL is led by its CEO, Rachel Kyte, who also serves as the Special Representative of the UN Secretary General (SRSG) for Sustainable Energy for All, as well as co-chair of UN-Energy. These roles include advising the UN Secretary General and his staff on issues relating to sustainable energy and the implementation of SDG7, and supporting the coordination of sustainable energy issues in the UN system.

The ambitions of SDG7 on ensuring universal access to affordable, reliable, sustainable and modern energy services by 2030 are extraordinary. Achieving them in the context of the Paris Climate Agreement involves transformation at a scale never undertaken before. Swift and ambitious action is needed by leaders in the governments, private sector, international institutions, investors, development banks and civil society. As a global platform, SEforALL crafts interventions that empower leaders to broker partnerships and unlock finance to achieve universal access to sustainable energy. All interventions comprise one or more of SEforALL's competencies:

- a) to marshal the evidence,
- b) to benchmark progress towards SEforALL objectives,
- c) to amplify the voices of the energy poor;
- d) to tell stories of success, and
- e) to connect stakeholders to each other and to solutions.

All interventions systematically draw on strategic insight, build on compelling communications, and are delivered through and include action-oriented partnerships. <http://www.seforall.org/>.

Context of assignment: SEforALL uses Podio. The software helps manage the daily workflows based on SEforALL's specific processes through the platform. This includes partner relationship management, the maintenance of existing and prospective partners database, management of meetings and follow-ups scheduling, conferences, forums and workshop planning. As a next step, our Podio platform needs to be further adapted for SEforALL's use. To function more effectively, the platform needs to be more fully automated, customized and integrated with other complementary services. These include:

- Full customization
- Automated workflows
- Task Management
- Meetings/Calls scheduling
- Outlook Mail/Calendar Integration
- Granular Access

- Connected CRM
- Data Visualization
- Project Management

A consultant(s) is sought for working with the SEforALL team to implement these features and ensuring that they are integrated with the work of the Partnerships Team of SEforALL.

Output Expectations

Contract is expected to be in effect from mid-August and to run no later than 15 September 2018.

Services must include the following:

#	Description of Items/Materials Required	Measurement	Quantity	Date of Required Service
a.	Define and agree on detailed workplan for Podio customization			30-Aug-2018
b.1.	Podio Improvements and Customization – Ability to record relationships between contacts and between organizations <ul style="list-style-type: none"> a. Knows/is a friend of b. Is related to c. Reports to/manages d. Is funded by/funds e. Is a client of/contracts f. Is a subsidiary of/is parent organization of g. Is a partner in/is an umbrella for 			Sep 1-10 Sep, 2018
b.2.	Tagging contacts and individuals (SEforALL board member, Foundation CEO, Grant officer, Key sponsorship contact, Corporate CEO, HNWIs etc)			Sep 1-10 Sep, 2018
b.3.	Group editing of contacts and organizations			Sep 1-10 Sep, 2018
b.4.	Email Integration: Ability to match emails automatically to prospects –ideally colleagues should be able to bcc one email address and Podio would tag the email to the contacts in question.			Sep 1-10 Sep, 2018

b.5.	Ability to upload multiple contacts from business card scans, and export/manage mailing lists (Cardcam extract and upload)			Sep 1-10 Sep, 2018
b.6.	Ability to designate lead relationship manager			Sep 1-10 Sep, 2018
b.7.	Ability to track stages in conversation as per current Partnerships team pipeline			Sep 1-10 Sep, 2018
b.8.	Ability easily to de-duplicate contacts and organizations/clean up old/orphan contacts etc.			Sep 1-10 Sep, 2018
b.9.	Sync with mobile app, ability to access contact details on the move			Sep 1-10 Sep, 2018
b.10.	Ability to track key funding opportunities/approaches that might include multiple organizations/contacts (e.g. "EU funding approach", "UN funding strategy", "SEforALL Forum Sponsorship Campaign")			Sep 1-10 Sep, 2018
b.11.	Ability to track funding pipeline (expected/target donation, % probability etc)			Sep 1-20 Sep, 2018
b.12.	Linking Organizations in contact to org			Sep 1-20 Sep, 2018
b.13.	Relational fields - link orgs together, contacts together etc			Sep 1-20 Sep, 2018
b.14.	Home button for Parma in Podio			Sep 1-20 Sep, 2018
b.15.	Search field for Parma			Sep 1-20 Sep, 2018
b.16.	Email to function automatically lists date and tags the organization – currently this is done manually.			Sep 1-20 Sep, 2018
b.17.	Prevent jpegs and gifs in email footers adding as attachments			Sep 1-20 Sep, 2018
b.18.	Merge Contacts			Sep 1-20 Sep, 2018
b.19.	Merge Organizations			Sep 1-20 Sep, 2018
b.20.	Keep some contact details restricted			Sep 1-20 Sep, 2018
b.21.	Tag for source of information			Sep 1-20 Sep, 2018
b.22.	How to stop creating a new contact for SEforALL staff each time copied on interaction			Sep 1-20 Sep, 2018
b.23.	Link contacts and organizations when creating a new organization.			Sep 1-20 Sep, 2018

b.24.	Track projects and milestones			Sep 1-20 Sep, 2018
b.25.	Live Gantt charts and real-time forecasting			Sep 1-20 Sep, 2018
b.26.	Spreadsheet and calendar view (for production and content calendars)			Sep 1-20 Sep, 2018
b.27.	File sharing			Sep 1-20 Sep, 2018
b.28.	Cloud storage integrations (OneDrive, Google Drive, Dropbox, etc)			Sep 1-20 Sep, 2018
b.29.	Email sync with Google apps, Outlook, Office 365, etc			Sep 1-20 Sep, 2018
b.30.	Record notes			Sep 1-20 Sep, 2018
b.31.	Data filtering			Sep 1-27 Sep, 2018
b.32.	Interactive projects dashboard			Sep 1-27 Sep, 2018
b.33.	Task management and the ability to sync tasks with Outlook			Sep 1-27 Sep, 2018
b.34.	Project and social collaboration			Sep 1-27 Sep, 2018
b.35.	Web and mobile ease of use			Sep 1-27 Sep, 2018
b.36.	Personal dashboard for projects			Sep 1-27 Sep, 2018
b.37.	Remove unused fields and tags			Sep 1-27 Sep, 2018
b.38.	Re-set tags based on what is now relevant			Sep 1-27 Sep, 2018
b.39.	Extract email addresses from mailboxes			Sep 1-27 Sep, 2018
b.40.	Upload business cards automatically scanned			Sep 1-27 Sep, 2018

Location of SEforAll Forum: The consultant is expected to work remotely from their home. However, the consultant is expected to be able to travel to Vienna, Austria based on tentative schedule below:

Type	Location	Days	Tentative Dates
Workplan Overview	Vienna, Austria	3	29-31 August
Final Handoff	Vienna, Austria	3	25-27 September

The cost of travel should be included in the proposal.

Time: The company must have operations in the or be willing to operate within an overlap of minimum of 4 hours between 9:00 a.m. to 17:30 (CEST).

Deliverables

A consultant(s) will be conducting the work under the supervision of the Partnerships Team for a duration of four weeks. The consultant will report to the Partnerships Director of SEforALL.

The consultancy is expected to be completed over one-month time-period from 30 August to Sept 28, 2018.

- By August 30, 2018 define and agree on detailed workplan for Podio customization
- By September 10, 2018 items 1-10 Completed
- By September 20, 2018 items 11-30 Completed
- By September 27, 2018 items 31-40 Completed

Payment Terms:

25% payment upon receiving and approval of Work Plan August 30, 2018

75% payment upon finalization of Podio Customization September 28, 2018

The supplier should send an invoice to UNOPS. 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. The agreement is subject to the performance of provider being satisfactory and timely.

Qualifications and Experience**Minimum requirements for each Consultant(s):**

- Minimum of a bachelor degree in computer science, IT or a closely related field. Other relevant qualifications may also be considered along with relevant experience.
- Minimum of 5 years of demonstrated specific experience in Podio/GlobiFlow, .NET, PHP, Ruby, Java, Javascript, XML, RSS, JSON, RESTful, OAuth2, webhooks and/or Python.
- Successfully delivered at least 3 Podio CRM implementations. Examples should be clearly stated in the application/quotation.
- Deep familiarity with the Podio API including demonstrable examples of past successful custom functionality implementations,
- Extensive experience with Office 365, Flow and MS Outlook including creating and using custom forms/fields.
- Knowledge on internet protocols including HTTP/S, web services, IMAP and email headers.
- Strong process designing, implementation and automation skills using Podio, and solid understanding of web and mobile applications development life-cycle, i.e. specification requirement, UI/ UX, content management system, scripting, database, and information architecture.
- Minimum of 3 years of experience working with various international organizations and/or non-profits to build processes, increase work efficiency and design project management model to deliver projects on time.
- Language skills: high level of competency in both written and spoken English.
- Ability to work both independently and collaboratively

The Consultancy Company Qualifications:

- The company should be a legal business and have been operation for a minimum of 3 years in providing consulting services.
- The company must have operations in the or be willing to operate within an overlap of minimum of 4 hours between 9:00 a.m. to 17:30 (CEST).