Terms of Reference for Local IT Company:

Assignment of IT Services for Establishing Data Management System /Client Relationship Management/ Electronic Membership Satisfactory Survey

Project name:	**Regional Capacity Development Network for Water and Sanitation Services** (hereafter **RCDN +**) *"Enhancing SHUKOS' Capacity as Primary CD Service Provider and Advocate PUCs in Water and Sanitation Sector of Kosovo"*
Title/Purpose:	**Long-term Assignment of IT services for Establish Data Management System, Client Relationship Management, Electronic Membership Satisfactory Survey.**
Duration of Assignment:	**Up to 46 days, April 2024 – April 2025**
Contracting authority:	*SHUKOS* **Abdullah Derguti– Executive Director**

March, 2024

1. Background

Water and Wastewater Works Association of Kosovo (SHUKOS) is a non-for-profit organization established by 7 Kosovo's Regional Water Supply and Sewerage Companies (RWCs). The Association operates according to NGO law (No.04 / L-57) has its own bodies, the Assembly and the Board of Directors, which consists of 7 Chief Executive Officers of 7 RWCs plus one representative of Ministry of Economic Development and one representative of Ministry of Environment and Spatial Planning. SHUKOS is a coordinator between the Water Companies and Governmental Institutions, cooperates with the National and International Associations, Local and International Donors and it is a member of the IAWD / IWA and is also partner association of the Regional Capacity Development Network (RCDN).

The Water and Wastewater Works Association of Kosovo has received financing for a Grant titled *„Enhancing SHUKOS Capacity as Primary CD Service Provider and Advocate PUCs in Water and Sanitation Sector of Kosovo"* in the frame of the project Regional Capacity Development Network (RCDN+) for Water and Sanitation services in SEE commissioned from the German Federal Ministry of Economic Cooperation and Development (BMZ) and Swiss State Secretariat for Economic Affairs (SECO), and it is administratively embedded in the GIZ Project "Open Regional Fund for Southeast Europe - Modernization of Municipal Services (ORF MMS)". The project "Regional Capacity Development Network (RCDN) for Water and Sanitation Services" connects local government units (LGUs), public water utilities (PUCs) and their associations from South East Europe (SEE) to work together on developing capacities in the water and sanitation service (WSS) sector.

As a partner association in frame of the RCDN Project, SHUKOS overall objective is to strengthen its capacities, enabling it to function as the primary CD service provider and effectively represent the interests of its members i.e., Public Utility Companies in Kosovo. From which derivates three specific objectives objectives of the entire Project:
- To strengthen SHUKOS' capacities by implementing measures aimed at improving internal strategic management
- To enhance SHUKOS Training unit by strategically improving procedures related to the training unit, the pool of trainers and to offer CD measures in line with Quality Standards (QSs)
- To establish a sustainable stakeholder dialogue mechanism for enhancing SHUKOS' policy dialogue, advocacy and lobbying efforts on behalf of its members.

To achieve the fulfilment of the first specific objective SHUKOS planned to work on a technological solution by creating an integrated system for the three main aspects: *Establish Data Management System / Client Relationship Management (including a pool of trainers (PoT) database / Electronic Membership Satisfactory Survey.* The main goal is to strengthen the organizational capacities of the association to achieve more effective services and management of relations with its partners, collaborators and members.

Through this system, SHUKOS aims to provide fast and intelligent services for its members, keeping all information in one place, tracking customer information and following their tracks, saving time and money, measuring customer satisfaction, generating various reports regarding the events, programs, meetings and trainings that SHUKOS offers.

2. Aim of the Assignment

The general objective of the assignment is to select a company who will provide IT Services as a solution for better performance of CD offer of SHUKOS for its member:

I.   *To establish Data Management System (DMS) that centralizes and organizes organizational data by using a cloud service.*

II.   *Development of a Client Relationship Management (CRM) to enhance client engagement, communication, and relationship management, analytics and reporting.*

III.   *To design and deploy an Electronic Satisfactory Survey (ESS) system for gathering feedback from clients in a more efficient and automated manner.*

The provider will take action as determined below under overall supervision of the Project Manager of SHUKOS and guidance of the Executive Director of SHUKOS:

1) Set of activities referring to the Data Management System (DMS):

I.   Participate in the preparatory talks and consultations (orientation & coordination meetings) with the SHUKOS.
II.   Conduct a comprehensive assessment of existing data sources and storage of all SHUKOS staff.
III.   Determinate the best cloud and secure option for SHUKOS needs.
IV.   Link the cloud with SHUKOS outlook official emails.
V.   Design the filing system of SHUKOS based on their needs.
VI.   Assist SHUKOS in integrating different types of data from disparate sources, including structured and unstructured data.

Deliverables of this set of activities:

- Provide a structure for organizations to easily manage, view protect the SHUKOS data's
- Determinate the structure of SHUKOS Data Management System
- Provide training of system use for SHUKOS staff
- Finalized the data integration process of SHUKOS

2) Set of Activities referring to the Client Relationship Management (CRM):

I.   Participate in the preparatory talks and consultations (orientation & coordination meetings) with the SHUKOS.
II.   Work on the design of CRM based on the specification below:
   - ✓ **Contact Management:** Keeping track of customer contact information, such as names, addresses, phone numbers, and email addresses.
   - ✓ **Opportunity Management**: Monitoring and managing CD products sales opportunities, including potential deals, the status and associated activities

- ✓ **Automation of CD Products:** automating CD Products processed, such as registering through SHUKOS web, sending pre and follow-up emails and reminders
- ✓ **Account Management:** Managing members accounts, including their payment history and ongoing contracts or agreements
- ✓ **Task Management:** Assigning and tracking tasks within staff such as reporting, meetings and other follow up.
- ✓ **Calendar and Event Management:** Scheduling and managing appointments, meetings, trainings and other events related to SHUKOS activities.
- ✓ **Email Integration:** Integrated email communication within CRM system to track correspondence with members, leads, trainees, and other possible "customers".
- ✓ **Document Management:** Storing and managing documents related to members interactions, such as contracts, proposals and invoices.
- ✓ **Reporting and Analytics:** Generating reports and analyzing data on CD products performance and other relevant reports.
- ✓ **Workflow Automation:** Automating repetitive tasks and workflows to streamline processes and improve efficiency.
- ✓ **Members and Trainees Support**: Managing support inquiries, event participation invoices.
- ✓ **Social Media Integration:** Integrating social media channels to monitor members and trainees' interactions, gather feedback.
- ✓ **Mobile Access:** Providing mobile access or tablet devices to the CRM system, allowing SHUKOS staff to access information and perform tasks on the go.
- ✓ **Integration with Other Systems:** to have opportunity that in the future to be linked with other systems based on the need of the association.
- ✓ **Segmentation:** segmenting registered people based on their status, such as member, trainer, moderator, trainee, participants, young water professionals.
- ✓ **Electronic Satisfactory Survey:** collecting customer feedback and conducting surveys to gauge satisfaction levels and identify areas for improvement.
- ✓ **User's Manual:** develop the manual for more effective use of the System.
- ✓ **Security and Data Privacy:** Implementing security measures to protect customer data and ensure compliance with data privacy regulations.

Deliverables of this set of activities:
- Design the overall architecture of the CRM system, including database structure, modules and integration points that will be easy of use and visual appealing
- CRM system should be based on shukos.org domain and linked with staff outlook emails as well as with SHUKOS Web page for specific activities that will be described below:
    - o Integration with Outlook emails and Calendar
    - o Integration of Microsoft Teams
    - o Events Calendar to be add in WEB and linked with CRM system
    - o Registration in Events through Events Calendar
    - o The system should capture leads from various sources such as website forms, emails, and social media

- o Electronic Satisfactory Survey to be add in WEB and linked with CRM system
- o Integration with the WEB and Facebook Post for publication
- o Newsletter to be add in WEB and linked with CRM system.
- Create 4 modules:
  - o Membership and Contact Management
  - o Trainings and Events
  - o Program and Projects
  - o Electronic Satisfactory Survey
- Human Resources Management
- The system should allow users to log in securely using unique credentials as well as to support different user roles (e.g., administrator, members representative, trainings representatives and project representatives) with varying access levels.
- Users should be able to log interactions with contacts, including calls, emails, meetings and notes.
- The system should include the automatic notifications (for blank fields and annual updates notifications).
- Easily export and import participants data to/from Excel Sheets.
- The software should design in both languages: Albanian and English.
- Regular progress meetings and evaluations will be conducted to ensure adherence to the terms of references.
- Proposed technological solution that meets the general and specific functionality criteria, compatibility and technical specification.
- Provide training and user's manual.
- Ongoing technical support given to SHUKOS staff.

3. Duration, Deliverables and Time Frame of the Assignment

The above deliverable must be completed within 46 working days over a duration of 1 year from the start date with the following time-line (based on one consultancy company): ***Starting on 20 April, 2024 and ending no later than 20 April, 2025***. This timeline is indicative; the IT Company is expected to provide a timeline of the activities per each set of activities in their proposal. The contract between SHUKOS and the company will be signed under the Laws of the Republic of Kosovo.

Timeline	Activity	Responsible
20 /04/ 2024	Signing of contract / Initial meeting	SHUKOS, Contractor
26/ 04/ 2024	Design the dynamic plan with contractor	SHUKOS, Contractor
01/05 – 01/06/2024	Working the Data Management System (DMS)	SHUKOS, Contractor
01/06 – 30/01/2025	Working on design of the Client Relationship Management (CRM)	SHUKOS, Contractor
01/02 – 20/02/2025	Working on design of the Electronic Satisfactory Survey (ESS) and integration of it in SHUKOS WEB	SHUKOS, Contractor

22/02 – 01/03/2025	Installation and configuartion of the System	Contractor
01/03 – 20/03/2025	Migration of Data in the Software	Contractor
20/03/ -30/03/2025	Testing and Validation of the system	Contractor
30/03/ – 10/04/2025	Customization of the features	Contractor
10/04/-19/04/2025	Training for the staff / also an ongoing activity	Contractor
20/04/2025	End of contract	SHUKOS, Contractor
Continuous	Ongoing technical suport	Contactor

4. Qualifications/Selection Criteria

The proposals will be evaluated based on the following criteria:

Evaluation Criteria	Weight
Demonstrated experience and ability to implement a DMS and CRM system - The company has prior successful experience in implementing a DMS or CRM solution over the past five years. - Experience with NGOs is preferred	15%
System implementation proposed schedule (Dynamic Plan) - The proposal needs to include a timeline of the activities to be carried out for the system implementation, training, technical support and upgrades.	5%
System capabilities and ability to meet the technical and functional requirements of this ToR.	40%
Price/Cost Proposal - Proposed cost, fees and expenses of the system, including implementation, training, and on-going support. - Pricing should be broken out to show costs related to one-time costs, and perpetual costs.	40%

5. Application Process

In order to be considered for this assignment, the Consultant must send his/her proposal in electronic form not later than 18/04/2024, at e-mail address info@shukos.org with copy (cc) to the Project Manager of SHUKOS Mrs. Erdonita Humolli: erdonita.humolli@shukos.org with subject: **Assignment of IT Services for Establishing Data Management System / Client Relationship Management / Electronic Membership Satisfactory Survey.**

The proposal has to be submitted in English. All pages of the proposal should be consecutively numbered. The proposal should contain the following sections:

1. General Information indicating experience in similar conditions, such as:

a. Company's general experience and expertise, and availability of appropriate skills among staff,

b. The company's Brochure including types of services offered related to CRM, DMS or CMS implementation and usage, and relevant experience working with sysytem implementation for NGOs.

2. Proposed System Implementation dynamic plan (Timeline of activities, deliverables)

3. Pricing/Cost Proposal for the following:

a. Provide the price for all proposed software.

b. Provide cost for licenses fees required and any other applicable fees.

c. Provide cost for hosting services.

d. Provide cost for customization of features that have been identified.

e. Provide the price for all proposed training and technical support.

f. Provide cost for maintenance and upgrade fees.

g. Provide the overall total ownership cost under the contract.

<u>Note</u>: Travel and other relevant cost of consultant will NOT be covered by SHUKOS and should be calculated as part of the fee.

6. Modification of Terms

SHUKOS reserves the right to modify the terms of the ToR at any time at its sole discretion.

7. Acceptance and Rejection of Proposals

SHUKOS may not necessarily accept the lowest priced proposal or any proposal. At its sole discretion, SHUKOS reserve/s the right to reject any or all proposals received and to accept any proposal which it considers advantageous, whether or not it is the lowest priced proposal. SHUKOS is not under any obligation to award a contract, and reserves the right to terminate the request for proposal process at any time, and to withdraw from discussions with all or any of the local IT companies which have responded. SHUKOS reserve/s the right to accept the proposed offer in total or in part, to reject any or all offers, to waive any minor informalities, irregularities, or technicalities, and to accept the offer deemed most favourable to the association and the RCDN.

8. Evaluation of work

After the award of the contract the Project Manager of SHUKOS/Focal Point, and responsible staff will monitor the quality of the ongoing technical support provided by the IT Company.