

**THE WORLD BANK
TERMS OF REFERENCE**

GEF CRM - REGISTRATION SYSTEM AND CONTACTS DATABASE

A. PROJECT BACKGROUND AND OBJECTIVES

The Global Environment Facility (GEF) is a financial mechanism for international cooperation providing new and additional funding to meet the agreed incremental costs of securing global environmental benefits. It works in partnership with the GEF Agencies, national governments and civil society.

The GEF requires a comprehensive, widely accessible (including Mobile), user friendly Customer Relationship Management (CRM) / Contact Management System that provides a complete set of tools for managing and leveraging the diverse array of GEF contacts.

Additionally the GEF requires an Event Registration System. The GEF Coordinates over 30 meetings and workshops per year worldwide and supports the travel and logistics for over 1000 participants to attend these events. In order to successfully manage these events, The GEF requires a comprehensive Event Registration System, tailored to meet the specific needs of our clients as well as function well within the World Bank's administrative environment. This system will interoperate with the CRM Contact Management database.

The objective is to create two tightly integrated systems that have natural synergies. It will be a streamlined package that will allow staff to rapidly access information that is currently stored in various, ad hoc databases, spreadsheets and other difficult to access structures. It will be designed for simplicity and ease of use with the philosophy of "less, but better" - focusing on core needs. The result will be greater access to critical data such as contacts, refined and customizable mailing lists, custom reports, and the ability to capitalize on relationships and historical data. The system will also provide increased productivity in terms of time spent managing the logistics of event registration, avoiding duplication of efforts and allowing greater ability to forecast future trends as well as highlight current results.

B. SCOPE OF WORK

The Consultant will

1. Develop a Contacts Management System / CRM System within the Drupal 7 platform,
2. Develop an Event Registration System within the Drupal 7 web platform,
3. Ensure that the systems share the same database, are highly available, robust and modifiable,
4. Ensure that the system is accessible on mobile platforms and can be easily accessed by mobile apps
5. and implement the GEF Registration and Contacts Systems

The plan includes but not limited to:

- 1) making all pages compatible with various types of web browsers: Chrome, IE7, IE8, IE9, FF, Safari

- 2) organization and migration of current content and knowledge store (current contacts)
- 3) creating mobile enabled themes to enhance efficiency, usability and accessibility

C. DELIVERABLES/SPECIFIC OUTPUTS EXPECTED FROM CONSULTANT

Deliverables:

- Web based Contact Management System / Customer Relationship Management System with the ability to send blast emails to selected contacts. The blast email must send only one email if a contact belongs to two or more lists. Subscribers must be able to unsubscribe via a link provided in the email.
- Mobile version (Read only) of Contacts System
- Moderated Web based Event registration system
- Synchronization mechanism between Registration system and Contacts system
- Compatibility of reports with World Bank administrative systems such as GSD travel
- Importing of all current contacts and registration data

Delivery Schedule:

Due to the nature of the project, various schedules will be discussed and agreed upon prior to the start of each iteration

- Month 1: a rough but working prototype is delivered. This prototype has to demonstrate key components: 1. event registration to contact workflow 2. report customizability 3. secure mobile access to contact through API (GEF will provide a factitious sample entries)
- Month 2 : Expand on prototype to provide complete working solution
- Month 3-4: Finalize/debug and fine tune

Acceptance Criteria for Deliverables:

- The visuals are tastefully designed for excellent readability and usability on both desktop and mobile platforms.
- Free of defects

D. SPECIFIC INPUTS TO BE PRESENTED BY THE CLIENT

The Client (GEF) will provide the specification and adjustment at each milestone in an agile fashion. A milestone is defined as a small functional unit that end-users can verify. Major milestones include:

- Completion of contact database
- Completion of data migration from the existing Access database
- Completion of registration

- Completion of contact/registration/CRM API design
- Completion of web application (contact/registration/administration)
- Completion of integration to Drupal
- Completion of mobile app

Please refer to the application mockup for more detail.

E. SPECIAL TERMS & CONDITIONS / SPECIFIC CRITERIA

The consultant must meet the following criteria:

- Education: Master's degree in Computer Science or equivalent experience
- Content Management System: Drupal 7
- Database design
- Computer Language: ASP.NET, C#, VB.NET
- App design a plus
- Languages: English
- Excellent interpersonal skills
- Excellent verbal and written communication skills
- Must be able to work in an agile manner
- Familiarity with GEF's workflow, mission and terminology is a plus