

Terms of Reference

Dóchas Contract for Services:

Community Portal Development with Supporting Business Processes

December 2024

1. Background

Dóchas connects, strengthens and represents a network of international development and humanitarian organisations who have a shared vision of a just, sustainable and equal world. Dóchas unites 54 organisations, ranging from small specialist charities to large international NGOs with a worldwide presence. Our members are committed to human rights, justice and the eradication of poverty, and demonstrate this through their work in international development, healthcare, protection, humanitarian assistance, sustainability, education and inclusion.

In our current [strategic plan](#), we aim to further develop a strong and dynamic network that enhances opportunities for connection, coordination and collaboration. As part of that, we seek to **create an increasingly innovative and inclusive space to stimulate and facilitate exchange** and reflect on complex challenges. Therefore we intend to build a **membership portal** and supporting business processes to enable greater collaboration.

2. Context and Discovery Phase Completion

Dóchas currently uses the **Salesforce (SF) platform** to capture and manage data internally around membership, suppliers, alliances, donors and sectoral stakeholders. The office operates on connecting Salesforce to **Google Workspace**, using Google mail and calendar, and Google Drives to store documents. Salesforce is connected to gmail and google calendar accounts in order to track activity for each Salesforce user against contacts, organisations and working groups in our Salesforce system. For marketing purposes we use Salesforce campaigns to communicate with and track interaction with members and stakeholders.

Dóchas currently connects members to each other primarily through the use of **Google Groups, with document management via shared drives**. Wider communications, such as the weekly newsletter, are done using Mailchimp lists.



Dóchas would like to build an **online community platform** for more streamlined and dynamic **member collaboration**, while at the same time improving internal efficiency through automated workflows and greater systems integration.

We have completed a Discovery Phase to:

- Explore the use of an online community platform such as Salesforce Experience or similar, for greater fluidity in member and stakeholder collaboration
- Explore automation of business, marketing / campaign management and reporting processes, integrating new and existing systems
- Propose the most appropriate work specifications and solutions

3. Objectives - Community Portal Build

We have now identified the need for the following deliverables:

A membership portal using Salesforce Experience Cloud, **or** appropriate alternative technology, which provides the following:

1. A portal with both public and private (logged-in Dóchas member) areas.
2. The portal would allow Dóchas members to
 - a. access information in one place
 - b. request to join working groups
 - c. sign up for in-person, online or hybrid events
 - d. collaborate with other members and and join online conversations
3. Event management functionality allowing Dóchas staff to create and manage events and log associated details. This may include the integration of online meeting platforms
4. Automation of processes allowing delivery of all scheduled or automated emails, such as Case creation emails, Portal member emails, Chatter emails
5. Reports and dashboards providing data relevant to portal users, member groups, and types of engagement
6. Training and documentation, deployment and testing, data load and initial support for going live with the new portal
7. Advice on website integration

To this end we have defined the following detailed business requirements:

Portal users will be able to:

- access a home page to see relevant information e.g upcoming events and information on working groups, and navigate to the right landing page
- login to the portal as a member, or view parts of the portal as a public user
- as a logged in member apply to join a particular Group directly through the portal
- as a logged in member access a Chat function for groups in order to collaborate with other users on particular themes



- as a logged in member access Google Drive links which store all documents relevant to a particular group
- as a public or logged in member, see a jobs listing page and click through to relevant listings
- as a logged in member upload a job to a job listings page and manage a list of job records so that other Portal users can see them
- as a public or logged in member register for events (in-person, online or hybrid) directly via the portal, receive confirmation and information, including reminders, and manage my attendance
- as a public or logged in member view the Dóchas X account, and/or other social media channels, within the portal
- as a public or logged in member manage my Profile, and associated details
- as a public or logged in member access an about page and/or FAQ page on the portal
- as a public User, generate a pre-populated email to a Dóchas email address to express interest in a topic, so that Dóchas will receive a Case which they can action and reply to

Portal Administrators (Dóchas staff) will be able to manage membership of the portal and supporting processes, including:

- see which Portal users have applied for which groups and approve or decline membership of those groups
- assign roles to people in Groups, so that the Group Members can see this in their portal
- create and manage in-person, online or hybrid events in the system, including logging attendance for everyone who has attended an event and associating them with relevant Salesforce records where relevant
- manage a job listings page
- see a Dashboard for Portal users, with key information like last login and unused licenses, etc.

Dóchas staff will also be able to:

1. use the Mailchimp integration within Salesforce to streamline marketing activities
2. have emails and events synced to Salesforce automatically

4. Expertise required:

We would like to work with IT, network and online engagement expert(s) or organisations who can confirm the approach we are taking and provide the deliverables outlined above. Providers should also be able to offer strategic, practical, and troubleshooting advice on the project.

The successful consultant or organisation will have:

- Deep operational knowledge of the options for community portal technologies
- Operational knowledge of and experience with CRM, including the Salesforce environment, Salesforce Experience and supporting apps
- Understanding of options for events management technology within a portal
- Experience with the wider ecosystem of IT infrastructure, systems development and integration
- Good communication skills



Additional skills or attributes include:

- An understanding of networks and network development
- An understanding of membership organisations
- Familiarity with the work of the international development sector
- Location in or near to Dublin, Ireland

5. Tender Process

Please respond to this Terms of Reference by emailing membershipengagement@dochas.ie with:

- An outline of your approach
- Details of estimated pricing
- A draft timeline for delivery.

Applications are open until **COB on January 17th**, and will be reviewed on a rolling basis. For more information please contact Gillian Ivory at gillian@dochas.ie.

