



Terms of Reference (ToR) for

Salesforce Consultant

Apply by **Sunday 14 July 2024**

1 Sphere

The Sphere movement was started in 1997 by a group of humanitarian professionals aiming to improve the quality of humanitarian work during disaster response. Sphere is a diverse global community of purpose and practice that brings together frontline practitioners, humanitarian agencies, community organisations, trainers, donors, policy makers, government agencies and affected communities, around a common goal – to improve the resilience of, and outcomes for, people affected by disaster and crisis.

Sphere establishes, promotes and reviews quality standards for humanitarian action which provide an accountable framework for preparedness, resource allocation, response, monitoring and advocacy, before, during and after disasters and crises. Sphere believes that people affected by crisis must be at the centre of decisions about humanitarian protection, assistance, recovery and resilience.

Sphere platforms are freely available and Sphere products are open source. We are committed to reaching as many people as possible, because we believe that principled humanitarian assistance – based on Sphere principles and standards – results in better outcomes for people affected by crisis.

Sphere is a registered not-for-profit charity in Geneva, Switzerland.

2 Background

Sphere has been using Salesforce Non-Profit Success Pack since 2022 – as a CRM, for grant management, and for budgeting/workplan.

Sphere had some external assistance for the initial configuration but has been administering the system in-house since. Sphere now recognises the need to bring in external expertise to advance its use of Salesforce to support strategic objectives.

3 Example tasks

Sphere envisages needing support for the following tasks in the coming twelve months. These are indicative only, non-contractual, and liable to change.

1. Refine user roles so Sphere staff have access to only the screens, functionalities and data they require to perform their duties, e.g., manager-only invoice approval process.
2. Add new tables (and related views, forms, related lists, workflows, etc.) to store content related to references to Sphere content in legislative documents (Sphere policy database).
3. Automate transfer of some data from Salesforce to Sphere website(s) to reduce some data redundancies/duplication between platforms (e.g., using scheduled reports, Power BI and/or API calls, as required.)
4. Ad-hoc office workflow improvements (RPA), e.g., support sending group emails to Campaign members via Outlook.

4 Consultant requirements

- Deep expertise of Salesforce for support, configuration and development.
- Working knowledge of other platforms used by Sphere (RESTful webservices, WordPress, HTML, XML, MSFT 365/Office, SharePoint, Algolia, Auth0) and Power BI to support integrations and multi-platform RPA.
- Experience of working with non-profits. Knowledge of NPSP (including PMM add-on) is a plus.
- Respect for Sphere's core values: dignity, learning and inclusion.

5 Timeframe and number of days

Sphere is seeking an automatically renewing annual pay-as-you-go contract, preferably with no minimum number of days. The contract start date is as soon as possible.

6 Location

The consultant can be based in any country except those restricted by the State Secretariat for Economic Affairs (SECO) of the Federal Council of Switzerland.

If based in Switzerland, the consultant must be registered and legally allowed to work in Switzerland.

7 How to apply

Please submit an expression of interest to recruitment@spherestandards.org before **Sunday 14 July**.

Your EOI should include company profile including similar work; motivations for wanting to work with Sphere (including alignment with our values); CVs of key staff; references; and financial proposition including daily/hourly rate by role, e.g., senior developer, junior developer, operations, etc. and minimum contract value per annum (if not zero).

Please write to the same email address if you wish to apply but cannot make the deadline.

Shortlisted organisations will be invited for an interview (virtual) during July or August.