



## **Terms of Reference for a Call Centre Development Consultant to establish the Northern Umbrella of Water and Sanitation Call Centre for improving WASH and sanitation service delivery.**

<b>Purpose of Assignment</b>	Setting up and operationalising a call centre for WASH services under the Northern Umbrella of Water and Sanitation, including installation of an enhanced web-based WASH service tracking and monitoring system.
<b>Location of Assignment</b>	Northern Umbrella of Water and Sanitation offices and selected service areas/districts under the Northern Umbrella.
<b>Duration of Contract</b>	3 months
<b>Start date</b>	From: 1 June 2026
<b>End date</b>	To: 31 August 2026

### **1. BACKGROUND AND OBJECTIVES**

Uganda has committed to reaching Sustainable Development Goal 6.2. While most households have access to some form of sanitation facility, access to improved and safely managed sanitation remains low, particularly in rural, small town and peri-urban contexts. Over 90 percent of Ugandan households rely on on-site sanitation facilities, many of which require safe emptying, transport and disposal when full. However, safely managed emptying services remain limited outside major urban centres due to weak market linkages, limited information on available service providers, high emptying costs, long haulage distances, and unsafe emptying or disposal practices.

The Sanitation and Hygiene Fund project is supporting the acceleration of access to improved sanitation and hygiene services using market-based approaches. The project contributes to the scale-up of household sanitation and hygiene services, increased sustainable WASH services in schools and public institutions, and innovation towards safely managed sanitation and hygiene. Digital systems are central to improving demand generation, service provider coordination, customer feedback, and performance monitoring.

The Ministry of Water and Environment established the Umbrellas of Water and Sanitation to improve operation, maintenance and service delivery for small piped water supply and sanitation systems. Under earlier SHF support, call centre models were established under the Central Umbrella and the Mid-Western Umbrella. The Central Umbrella call centre has supported customer inquiries, call detail recording, and linkages between communities and service providers such as pit emptiers. The Mid-Western Umbrella call centre introduced improved features including short message services, robust job dispatch and real-time feedback mechanisms.

The benefits registered under these call centre models have motivated the Ministry of Water and Environment and partners to scale the approach to the Northern Umbrella of Water and Sanitation. The Northern Umbrella call centre is expected to provide a structured access point for WASH service requests, strengthen service provider linkages, improve sanitation business prospects, and improve accountability and response times for customers and communities.

A comparative review of existing call centre models showed that manual operations limit efficiency, responsiveness and data use. Key gaps and limitations to be addressed through this assignment include:

- Manual operations: reliance on manual call logging and updates makes it difficult to monitor service delivery in real time and track delays.
- Limited job dispatch capabilities: absence of automated assignment and notification systems slows coordination between the call centre, service providers and customers.
- Inadequate data management: lack of a centralized digital database limits storage, analysis and retrieval of historical job and performance data.
- Minimal performance monitoring: weak analytics and reporting tools constrain data-driven decision-making and assessment of service provider performance.
- No real-time feedback mechanism: customers, agents and service providers lack reliable channels for job status updates and structured feedback, affecting transparency and accountability.

Given these limitations, there is a clear need to establish the Northern Umbrella call centre with a comprehensive, web-based WASH Service Tracking and Monitoring System from the outset. The proposed digital transformation will streamline customer intake, automate dispatch through SMS, enable real-time tracking, support robust analytics and reporting, and position the system for future scale-up across other districts and Umbrellas.

The call centre is expected to:

- Provide exceptional customer service through effective communication channels.
- Handle customer inquiries, complaints, service requests and feedback promptly and efficiently.
- Strengthen linkage between customers and WASH service providers, including pit emptiers, toilet construction artisans, water supply teams and solid waste service providers where applicable.
- Maintain high standards of professionalism, courtesy, data protection and confidentiality in all interactions.
- Continuously improve processes and workflows to enhance customer satisfaction, operational efficiency and service accountability.
- Generate reliable service delivery data for planning, performance monitoring and reporting under the SHF project and the Umbrella system such as the customer satisfaction surveys.

## 2. SCOPE OF WORK

The overall purpose of this consultancy is to support the Northern Umbrella of Water and Sanitation to establish, operationalise and enhance a call centre that improves access to water and sanitation services for households, schools, health facilities, public places and other customers within the Northern Umbrella service areas.

The call centre will serve as an ecosystem catalyst by connecting customers with water and sanitation services, including new connections, toilet construction, pit emptying, fecal sludge management, solid waste management where applicable, and other WASH-related services. The assignment includes both physical call centre setup and installation of a comprehensive digital WASH service tracking and monitoring platform.

The consultant shall undertake the following scope:

- Supply, install and configure the required call centre hardware, server or cloud infrastructure, local area network, computers, headsets/phones and other equipment required to support at least four workstations and four call centre agents.
- Provide and configure call centre telephone software, call routing, call monitoring and call reporting capabilities, including integration with a toll-free line or approved customer access number.
- Equip the call centre with the necessary furniture and communication tools to support effective call handling and documentation.

- Advise on visibility and rebranding requirements for the Northern Umbrella call centre, including customer-facing information on how to access the call centre.
- Install a comprehensive web-based WASH Management Platform with customer intake and job creation interface, real-time job tracking dashboard, service provider management system, SMS integration with Africa's Talking or an equivalent approved SMS gateway, role-based access control and mobile-responsive design.
- Develop and deploy an analytics and reporting module with performance metrics dashboards, trend analysis and forecasting, export capabilities in PDF, Excel and CSV formats, custom report generation and historical data analysis.
- Provide system integration and enhancement services, including integration with any existing Umbrella or call centre databases, API development and documentation, data migration and synchronization, security enhancements and encryption, and cloud infrastructure setup, preferably on Google Cloud Platform or another approved secure cloud environment.
- Set up a data capture system to record each call, service request, customer details, service provider assignment, job status, feedback, resolution and closure details.
- Provide technical training and hands-on coaching to Northern Umbrella staff and call centre agents on operation, administration, reporting, data protection and maintenance of the system.
- Facilitate cross-learning for NUWS staff with either Central or Mid-Western Umbrella where the call center has successfully been implemented.
- Provide post-handover support during the contract period to ensure system stabilization, troubleshooting, user support and knowledge transfer.

### 3. KEY TASKS

- Review existing call centre models under the Central and Mid-Western Umbrellas and incorporate relevant lessons into the Northern Umbrella setup.
- Design and develop the Northern Umbrella call centre system through which WASH service requests can be received, documented, assigned, tracked, reported and closed along the service value chain.
- Set up a toll-free line or approved customer access channel that will generate demand for WASH and sanitation services within the Northern Umbrella service areas.
- Develop and configure a web-based WASH service tracking and monitoring platform with customer intake, job creation, service provider management, SMS dispatch, real-time job tracking, feedback and reporting functions.
- Develop a centralized digital database and data capture tools to track service access, customer requests, response times, job completion, feedback, complaints, and service provider performance, including services accessed by low-income and bottom-of-the-pyramid customers.
- Configure SMS notifications and dispatch workflows for call centre agents, customers and service providers, including job assignment, status updates, reminders and feedback prompts.
- Develop dashboards and automated reports for management decision-making, including daily, weekly and monthly call centre performance reports.
- Migrate or synchronize any available existing call centre or service provider data into the new system, subject to data quality and approval by MWE.
- Prepare system documentation, API documentation where applicable, operation manuals, maintenance manuals and user guides.
- Clearly identify relevant Northern Umbrella staff, define their system roles and responsibilities, and train them to manage the call centre on a sustainable basis.
- Provide at least five days of structured training for Umbrella staff and agents on call centre operations, digital platform use, reporting, data protection, customer care and basic troubleshooting.

- Provide post-handover support and corrective actions during the contract period to ensure full functionality and adoption of the call centre system.

#### 4. DELIVERABLES AND TIMELINES

The main outcome of the consultancy is that MWE, Water For People and the Northern Umbrella of Water and Sanitation are able to receive, assign, track, monitor and report on WASH service requests and customer feedback through an operational call centre and an enhanced digital WASH service tracking and monitoring system.

No.	Tasks	End Products / Deliverables	Time Frame
1	Inception report indicating detailed work plan, call centre design, system architecture, training approach, hardware/software specifications, data protection approach and implementation schedule.	Approved inception report with detailed system design, work plan and training guide.	Within 2 weeks of signing the contract
2	Physical setup of the call centre, including workstations, network, telephony/call centre software, toll-free line or approved access channel, and basic call logging functions.	Setup report confirming installed equipment, functioning call centre line/access channel, call routing, call monitoring and evidence of test calls.	Within 5 weeks of signing the contract
3	Development and deployment of the web-based WASH service tracking and monitoring platform, including customer intake, job creation, service provider management, SMS dispatch, real-time tracking, feedback and role-based access control.	Functional WASH management platform deployed and tested, with user accounts, service provider database, SMS integration and evidence of real-time job tracking.	Within 6 weeks of signing the contract
4	Development of analytics, reporting and data management functions, including dashboards, custom reports, exports, trend analysis, historical data analysis, data migration/synchronization and cloud/security setup.	Analytics and reporting module deployed, with evidence of downloadable reports in PDF, Excel and CSV; data migration/synchronization report; security and cloud setup note.	Within 7 weeks of signing the contract
5	Training of Northern Umbrella staff and call centre agents for at least five days, including customer care, system use, reporting, data protection, administration and troubleshooting.	Training report, attendance lists, training materials, user roles and updated operation manual.	Within 8 weeks of signing the contract
6	Post-handover support, system stabilization, documentation and final reporting.	Final report including system features deployed, final operation manual, maintenance manual, API documentation where applicable, user guide, lessons learned and support log.	Within 10 weeks of signing the contract

## 5. PROPOSED PAYMENT SCHEDULE

Deliverable	Payment Schedule
Approved inception report with detailed system design and work plan	20%
Call centre setup report confirming installed equipment, functioning access channel and call centre features deployed	25%
Functional web-based WASH service tracking and monitoring platform with SMS dispatch and real-time tracking	25%
Analytics/reporting module, data migration/synchronization, cloud/security setup and training report	15%
Final report, final operation manual, maintenance manual, API documentation/user guide and post-handover support log	15%

## 6. QUALIFICATIONS, SPECIALISED EXPERIENCE AND ADDITIONAL COMPETENCIES

The selected consultancy firm should demonstrate the following minimum qualifications and experience:

- At least five years of experience in developing and deploying call centre systems, CRM systems, digital service tracking systems or similar platforms for municipalities, utilities, towns, government institutions or development programmes.
- Proven experience in call centre software, CRM systems, database development, dashboards, SMS gateway integration, API development, data migration and cloud deployment.
- Project management and IT skills, including Linux/Unix administration, Asterisk PBX or equivalent telephony software, web application development, cyber security and user support.
- Familiarity or prior work experience with cities, municipalities, town councils, utilities, Government of Uganda, UN agencies, international development organizations or WASH sector institutions.
- Demonstrated understanding of WASH, sanitation service delivery, fecal sludge management, customer service workflows and service provider coordination.
- Ability to provide practical training, documentation and post-handover support to non-technical users.

Required key personnel should include, at minimum:

- Team Leader / Project Manager with a relevant degree in Computer Science, Information Technology, Software Engineering, Information Systems, Project Management or a related field, and proven experience leading similar assignments.
- Software Developer / Systems Architect with relevant qualifications and experience in web application development, database design, API development, dashboard development and SMS integration.
- Telephony / Call Centre Systems Specialist with experience in PBX, call routing, call monitoring, VoIP, toll-free line integration and call centre reporting.
- Data / M&E Specialist with experience in database development, data quality assurance, analytics, reporting dashboards and export functions.
- WASH / Sanitation Specialist with relevant experience in sanitation service delivery, fecal sludge management, WASH service monitoring or market-based sanitation programming.
- Training and Change Management Specialist with experience in user training, manuals, coaching and institutional adoption of digital systems.

## 7. MANAGEMENT AND OVERSIGHT

In addition to day-to-day supervision by the designated contract supervisor, a project team will be constituted to provide strategic direction, technical review and feedback during implementation.

- Water For People: Procure and contract the service provider and provide financial and technical support, review deliverables, support quality assurance and provide technical guidance in relation to urban WASH, sanitation service delivery and market-based sanitation.
- Ministry of Water and Environment: Provide oversight through the Sewerage Services Division, relevant ICT staff and the designated innovations or technical specialist from Water For People.
- Northern Umbrella of Water and Sanitation: Provide office space and practical guidance on where to set up the call centre, identify call centre agents and relevant staff, support data access and service provider mapping, provide server/network space where required, and support call centre marketing and visibility.
- Consultant: Provide technical leadership, equipment, software, system configuration, documentation, training, support and reporting as required under this ToR.

## 8. CONTENT OF TECHNICAL PROPOSALS

The technical proposal must contain, but is not limited to, the following:

- Methodology and approach for carrying out the assignment.
- Proposed system architecture and description of the call centre and WASH service tracking platform.
- Proposed details of installations, including specifications of hardware, software, cloud environment, telephony solution, SMS gateway, security controls and backup arrangements.
- Implementation plan, work plan, training plan, quality assurance plan and risk mitigation plan.
- Introductory note, company profile, list of similar projects delivered, client references, project team, signed CVs of individuals proposed for the assignment, supporting certificates, financial statements, company organogram and legal registration documents.
- Evidence that the firm has implemented at least two similar call centre, CRM, service tracking or digital management systems, with at least one assignment for a government institution, utility, municipality or development programme.
- Description of data protection, cyber security, user access control and system maintenance arrangements.

## 9. CONDITIONS OF WORK

- Provision of services will not commence unless a contract is signed by both parties.
- The resulting contract will be supervised by MWE and Water For People through the designated contract management arrangements.
- All materials, software configurations, source code developed specifically for the assignment, databases, manuals and documentation are subject to intellectual property considerations under the SHF General Terms and Conditions of Contract and the specific contract terms.
- All anticipated travel, accommodation, field and logistical costs must be included in the financial proposal. Water For People will not be responsible for transport, accommodation or subsistence costs outside what has been included in the financial proposal and approved contract.
- The consultant shall ensure confidentiality, data protection, secure storage, controlled access and ethical use of all customer and service provider data.
- The lead consultant shall be the liaison between MWE, Water For People, the Northern Umbrella and the consultancy firm.
- The consultant shall provide warranty/support during the contract period and correct defects identified before final acceptance.

## 10. BIDDING PROPOSALS, EVALUATION PROCESS AND METHODS

Technical and financial proposals should be submitted for this bid. The consultant will provide a financial proposal for each major deliverable and the total budget. A two-stage procedure will be used in evaluating the proposals. A proposal is selected on the basis of cumulative analysis; the total score is obtained by combining technical and financial attributes. Proposals shall be rejected at the technical stage if they fail to achieve the minimum technical threshold of 70 percent of the obtainable technical score prior to financial proposal opening and comparison.

Item	Technical Evaluation Criteria	Maximum Points
1	Overall response: understanding of the assignment, interpretation of objectives, critical examination of tasks and proposed improvements	15
2	Methodology and technical approach: system design, call centre setup approach, WASH platform architecture, SMS/job dispatch workflow, data migration, dashboards, cyber security and quality assurance	25
3	Firm qualifications, capacity and previous similar assignments in call centre systems, WASH/digital service tracking, CRM, utilities, government or development programmes	20
4	Key personnel qualifications and relevance, including team leader, software developer/systems architect, telephony specialist, data/M&E specialist, WASH specialist and trainer	20
5	Work plan, implementation schedule, training plan, maintenance/support plan and risk management	10
6	Stakeholder engagement and change management approach	10

Total technical score: 100 points, weighted to 70 percent. Minimum technical threshold: 70 percent of the technical score.

Financial proposal: 30 percent. The financial proposal should be presented in Uganda Shillings and include all inherent costs of the consultancy, including personnel, equipment, software, licences, SMS setup, cloud hosting during the contract period, travel, accommodation, training, documentation and support. The financial score will be calculated based on the standard lowest-price formula, where the lowest evaluated financial proposal receives the maximum financial score.

The contract shall be awarded to the bidder obtaining the highest combined technical and financial score. Proposals not complying with the terms and conditions contained in this ToR, including the provision of all required information, may be disqualified.

## 11. ADMINISTRATIVE ISSUES

- The bidder should provide an all-inclusive cost in the financial proposal, including all cost implications for the required service/assignment.
- Travel costs shall be calculated based on the expected travel to the Northern Umbrella offices, relevant districts and partner offices. Costs for accommodation, meals and incidentals shall be included in the financial proposal.
- Unexpected travel shall be subject to prior written approval and treated in accordance with the contract provisions.
- Under the consultancy agreement, a month is defined as 20 working days, and fees are prorated accordingly.
- Team members are not entitled to overtime. All remuneration must be within the contract agreement.

## 12. REQUIREMENTS ON THE FORMAT OF THE BID

The structure of the bid must correspond to evaluation criteria. It must be legible (font size 11, line spacing 1.0, font Arial) and clearly formulated. The bid should be drawn up in English.

**The complete bid shall not exceed 30 pages including signed CVs and any other attachments.**

All financial and technical proposals should be sent to [uganda@waterforpeople.org](mailto:uganda@waterforpeople.org), by the extended deadline of **25<sup>th</sup> May , by 1700hours**. Please note that any application received after this deadline will **NOT** be accepted.