equitas

TERMS OF REFERENCE

EXTERNAL CONSULTANCY TO DEVELOP A TECHNOLOGY STRATEGY FOR EQUITAS

1. Background:

Equitas – International Centre for Human Rights Education is seeking an external Consultant to lead the development of a technology strategy for the organization, and in particular the selection of appropriate IT tools, software and systems for a variety of business needs, as well as a clear plan, including resources (HR and financial), to implement the recommended solutions. Currently Equitas has a wide variety of solutions being used and they are not all necessarily well connected and integrated. Equitas seeks to have a more holistic approach to its technology solutions in the future. Equitas has limited resources, both in terms of human resources and financial, to allocate to the actual implementation of new solutions. This is an important factor that will have to be considered by the Consultant in the development of a strategy. Equitas aims to develop a technology strategy that is realistic in ambition and scope, and to the extent possible building on the tools and systems already used by the organization.

In addition to already using a variety of technological solutions, Equitas is launching the Act Together for Inclusion Fund (ACTIF) , a new project in which it will administer a Fund directed to other Canadian civil society organizations. Equitas therefore seeks an external Consultant with experience with grant-making tools and processes, in order to support the selection and implementation of a grant management solution.

For information, Equitas is currently using/developing the following tools, software, databases and systems:

- Microsoft 365 suite, including full implementation of Microsoft Teams for remote work and team collaboration

- Smartsheet: primarily used for annual planning purposes

- Salesforce: for contact management and management of international training program (including application process)

- Prodon V: for fundraising management purposes

- SAGE 50 (not cloud-based version)

- Microsoft Excel for management of monitoring and evaluation data of projects

- Go-to meeting

- Zoom and Adobe connect for online activities (events, webinars, trainings)

- Adobe professional (mainly InDesign, Adobe Acrobat)

- Database of all knowledge products for internal and external sharing

- Moodle (online learning)

- 3 active websites (WordPress and Craft)

- Physical servers that are transitioning to cloud-based servers (Azure)

In the future Equitas aims to have a more holistic approach to the tools and solutions we use to support our work, in the following seven main areas:

- Service delivery of Equitas activities (trainings, webinars, etc.)

- Grant-management

- Content & knowledge management (Sharepoint, cloud-based services, database)

- Annual planning (results, KPIs, resource management)

- Monitoring and evaluation

- Fundraising and communications

- Accounting/budget management

2. Objectives

The overall objective of this consultancy is to develop a three-year[1] technology strategy to ensure that Equitas has the technological solutions, resources, and architecture in place to support the achievement of its organizational strategic plan.

3. Scope of work

The scope of work for the Consultant will include but not limited to:

- Lead the development of an overall technology strategy for Equitas that takes well into account the financial and human resources available for the implementation of such a strategy:
  - o Support Equitas to outline goals and objectives;
  - o Define scope, stakeholders, and timeline
  - o Review the existing setup (how are Equitas teams and units using technology, and what tools, software and systems are they using and how these intersect)
  - o Create a roadmap (implementation plan, resources, capacity building plans for staff on tools/solutions)
  - o Establish metrics for monitoring of the IT strategy.

- Advise Equitas on the selection of a grant management solution:
  - o Support Equitas to clearly articulate needs for a grant management solution.
  - o Recommend 3 shortlisted vendors.
  - o Provide roadmap for implementation of the chosen solution.

- Advise Equitas on the selection of a monitoring & evaluation (M&E) solution:

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[1] A 3-year (2021-2024) plan is suggested to take align with the end of Equitas' current 5-year strategic plan (March 2024).

- Support Equitas to clearly articulate needs for an M&E solution

    - Recommend 3 shortlisted vendors.

    - Provide roadmap for implementation of chosen solution.

- Advise Equitas as to whether Salesforce is an appropriate solution for use at Equitas, and if so, support the development of an implementation plan for the organization.

4. Expected deliverables

- **Work plan covering the assignment**: will describe how the work is to be carried out, bringing refinements, specificity, and elaboration to these terms of reference. It will act as an agreement between the parties as to how the work will be conducted.

- A **3-year technology strategy** including results, key performance indicators, resources (both financial and human resources), roadmap to guide implementation, and recommended tools, software and systems to be implemented by Equitas.

All written outputs of the consultancy are expected to be delivered in English or French, with a slight preference for English. The Consultant will follow the format, structure and length defined by Equitas. The quality of the outputs will be assessed by the Equitas Programs Manager.

5. Duration and location

This assignment is expected to be carried out for a period of 15 to 25 working days. The consultancy is expected to be conducted between October 2020 and January 2021.

The assignment is expected to be home-based with all meetings to be connected virtually. The Consultant will supply all necessary equipment required (ex: computer, phone, internet, etc.).

6. Management arrangements

The Consultant will report directly to the Equitas Programs Manager, Katie Corker. Equitas will provide relevant background documents necessary for the assignment. The Consultant will be expected to work closely with Equitas' IT committee, comprised of 5-6 persons[2].

7. Proposed timelines

- Start date: October 1st, 2020 (or sooner)

- Prepare work plan and review existing documentation: October 7th, 2020

- Functional requirements for grant management system and recommendation for short list of grant making systems: October 19th, 2020

- Demos of grant making Systems: October 26th, 2020

- Draft IT strategy: October 28th, 2020

- Selection of grant management system: November 4th, 2020

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[2] The IT committee is led by the IT Manager, co-led by the Programs Manager, and includes as members the Knowledge Manager, the Monitoring, Evaluation and Reporting Advisor, as well as 2-3 Program Officers.

- Support during set up of grant management system and Fund launch (November 2020)
- Final IT Strategy: November 30th, 2020

8. Qualifications of the consultant

The Consultant should have the following experience, skills, and knowledge:

- Demonstrated experience in working with non-profit and/or charitable organisations in Canada, especially in the sector of international development;

- Demonstrated experience in developing technology strategies for non-profit organisations of similar size to Equitas (approximately 50 staff, CDN$5,000,000/year financial volume);

- Evidence of having undertaken similar assignments;

- Demonstrated experience in grant making processes for small organizations and/or organizations with limited experience to manage grants (CDN $10million over 6 years);

- Ability to manage the available time and resources and to work to tight deadlines;

- Independence from the parties involved;

- Ability to communicate orally, and read and understand documents, in both of Canada's official languages (English and French);

- Familiarity with international development issues and the work of development institutions is a valuable asset.

9. Application Process

Interested and qualified candidates should their applications which should include the following:

- Detailed Curriculum Vitae

- Proposal for implementing the assignment, including daily rate in CDN$, key components of work to be conducted including timeframe and level of effort (in # of days) and total cost.

- Description of the key components a technology strategy should include.

Please quote "**IT Consultancy – Equitas**" in the subject line.

Applications should be emailed to Katie Corker, Equitas Programs Manager (kcorker@equitas.org) no later than Monday, <u>September 21, 2020</u> at 5pm Montreal time.