



TERMS OF REFERENCE

EXTERNAL CONSULTANCY FOR SELECTION OF GRANT MANAGEMENT PLATFORM

1. Background:

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. As grant-making is a new business area for the organization, 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 appropriate for the ACTIF project.

2. Objectives

The overall objective of this consultancy is to advise Equitas on the selection of a grant management solution.

3. Scope of work

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

- Support Equitas to clearly articulate needs for a grant management solution.
- Gather functional requirements for grant management system and make recommendation for 3 shortlisted vendors.
- Coordinate up to 3 demos with software vendors and facilitate decision-making on final selection of grant management system.
- Provide roadmap for implementation of the chosen solution.

4. Expected deliverables

1. **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.
2. 1 **requirements table** of grant management system user stories.
3. 1 **presentation deck** on shortlisted vendors
4. 3 x 1-hour **software demos**
5. 1 **presentation deck summarizing business case and rationale** for decision on grant management system

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 ACTIF Fund Director.

5. Duration and location

This assignment is expected to be conducted between November 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 ACTIF Fund Director, Anne Delorme. Equitas will provide relevant background documents necessary for the assignment. The Consultant will be expected to work closely with the ACTIF project team.

7. Proposed timelines

- Start date: November 2nd, 2020
- Functional requirements for grant management system and recommendation for short list of grant making systems: November 12th, 2020
- Demos of grant making Systems: November 23rd, 2020
- Selection of grant management system: December 4th, 2020
- Support during set up of grant management system and Fund launch (December 2020-January 2021)

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 and familiarity of international development is a valuable asset;
- 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) is preferred;

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.

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 Sunday, October 25th, 2020.