



TERMS OF REFERENCE

EXTERNAL CONSULTANCY FOR SELECTION OF MONITORING & EVALUATION PLATFORM

1. Background:

Equitas seeks an external Consultant with experience with monitoring and evaluation tools and processes as well as with accompanying organizations to select appropriate IT solutions, in order to support the selection and implementation of a monitoring and evaluation solution appropriate for Equitas. Equitas is currently using Microsoft Excel for managing all of its Program data.

Equitas is Canada's most recognized and active human rights education organization. We work for the advancement of equality, social justice and respect for human dignity through transformative education programs. We empower people to address inequalities and discrimination, and to work to build more inclusive and rights-respecting communities.

2. Objectives

The overall objective of this consultancy is to advise Equitas on the selection of a digital monitoring & evaluation (M&E) solution to collect, store, manage and retrieve data from all programs as well as organizational processes. The digital solution must allow for multiple users and off-site access. The intention is to pilot a solution with one of Equitas' programs first before scaling up to the entire organization.

3. Scope of work

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

- Support Equitas to clearly articulate needs and criteria for a comprehensive M&E solution that responds to current and projected use.
- Gather functional requirements for an M&E system and make recommendations for 3 shortlisted vendors.
- Coordinate up to 3 demos with software vendors and facilitate decision-making on final selection of an M&E 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 M&E system user stories.
3. 1 **presentation deck** on shortlisted vendors
4. 3 x 1.5-hour **software demos**
5. 1 **presentation deck summarizing business case and rationale** for decision on M&E 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 Equitas Programs Manager.

5. Duration and location

This assignment is expected to be conducted between May and September 2021.

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

6. Management arrangements

The Consultant will report directly to the Programs Manager, Katie Corker. Equitas will provide relevant background documents necessary for the assignment. The Consultant will be expected to work closely with the Equitas project team, comprised of the Monitoring, Evaluation & Reporting Advisor (MERA), the Programs Manager and IT Manager.

7. Proposed timelines

- Start date: May 15th, 2021
- Functional requirements for M&E system and recommendation for short list of M&E systems: End June 2021
- Demos of M&E Systems: July 2021
- Selection of M&E system: August 2021
- Support during set up of M&E system : September 2021

8. Qualifications of the consultant

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

- Demonstrated experience working in human rights or international development with non-profit and/or charitable organisations in Canada;
- Evidence of having undertaken similar assignments;
- Demonstrated experience in M&E processes for medium sized organizations and/or organizations managing complex, multi-country programs;



- Strong knowledge of M&E approaches, methods, and tools;
- Works well in a team to advance the goals of Equitas, including openness to constructive feedback and focus on results for the client;
- Excellent organizational skills and ability to manage the available time and resources;
- 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 send their expression with the following items:

- A CV/s of the individual or team of people who will conduct the assignment. Each CV should be no longer than three pages and contain relevant information, particularly relevant experience of the individual/team.
- A Financial Proposal including daily rate in CDN\$, number of days and total cost.
- A delivery plan including timelines with starting dates, and key deliverables.
- List of past clients for whom the most closely related work was conducted, indicating those who may serve as professional references with contact information.

Applications should be sent to Katie Corker, Programs Manager, at kcorker@equitas.org with "M&E System Consultancy – Equitas" in the subject line by **11:59pm Sunday, April 18, 2021**.

If you have questions regarding this work, please do not hesitate to reach out to Katie Corker, Programs Manager. Short-listed applicants may be asked to participate in a virtual discussion with Equitas.

Given the nature of our work, we encourage applications from any candidates who have experienced marginalization, in particular, Black, Indigenous, and People of Colour, LGBTQ2I people, and people living with disabilities. Candidates who wish to do so may self-identify in their application. All employment offers are conditional of satisfactory references and the signing of Equitas Human Resources Policy and the Policy on Preventing Sexual Violence, Harassment and Discrimination.

Equitas thanks all applicants for their interest. However, only applicants selected for an interview will be contacted. Equitas offers a competitive salary and benefits in the NGO sector.

For further information about Equitas consult our website at www.equitas.org.