



PROTECTION
international

Terms of Reference (TOR)

Senior technical expertise in developing TOR for PI's Enterprise Resource Planning system, and accompanying its development, and deployment

Duration: 2 month process starting in August 2021. PI expects the consultant(s) to be available according to the process needs. There may be some periods with non-activity meanwhile internal decision-making processes take place.

Background Information

Protection International (PI) is an international non-profit organisation that supports human rights defenders in developing their security and protection management strategies.

PI aspire to a world in which fundamental human rights and fundamental freedoms are universally recognised and respected by all, and where everyone has the right to defend these rights and freedoms without fear of threats or attack. Its contribution to that world is to support HRDs through comprehensive protection programmes.

PI has been working since 2007 with local partners in over thirty countries. Its programmes enable defenders to build their capacities in order to manage their protection effectively, to allow those that protect them to fulfil their obligations, and to convince other individuals and institutions with a stake in the protection of human rights defenders to maximise their positive contribution. PI's DNA is in essence grass-roots, as its focus has always been to act from the territories' perspective and for the defenders' benefit, from the local to the international level, through a bottom-up approach. This grass-roots approach aims to increase agency for the most vulnerable defenders while contributing to the creation of safe spaces for W/HRDs to continue working on the ground.

PI has an average of 80 employees distributed in 8 offices worldwide: Guatemala, Honduras, Colombia, Kenya, DRC, Thailand, Indonesia and Belgium. PI working languages are English, French and Spanish.

Rationale

PI is in need of a standardised resource planning, and management system to facilitate the automated processing of financial, Human Resources, asset, grant, project, and donor-related information between offices in compliance with national regulations. Under its 2019-23 Global Strategy, PI is currently undergoing a decentralisation process, which demands the implementation of a system to exchange, process, manage, and retrieve information from all offices globally. As a result, PI shall undertake the design, development, piloting, and implementation of an Enterprise Resource Planning system that fits PI's current needs.

To this end, PI has developed a roadmap in four phases:

- **Phase I. Development of TOR for the ERP system (scope of this consultancy)**
- Phase II. Preparation, planning and design
- Phase III. Development
- Phase IV. Piloting
- Phase V. Implementation

Scope and objective

For Phase I (Development of TOR for the ERP system), PI is looking for consultants with extensive technical expertise of ERP systems, and its potential building blocks, as well as knowledge of decentralized not-for-profit organization in developing TORs for PI's future ERP system. This consultancy should consider PI's transition to a decentralised organisation and other institutional aspects that PI is currently working on to improve.

Main activities (indicative list and timeframe), and deliverables

Phase I - Development of TOR for the ERP system (up to 2 months):

1. Analyze PI's current practices, workflow, information needs (input), and provisions (output), as well as lines of responsibilities, and roles of all units in all offices (conducted in English, but French, and/or Spanish language capacities would be preferred).
2. Devise strategies, and name a preferred methodology to improve PI's practices based on aforementioned analysis, feedback from PI staff, as well in regard to existing capacities, and functionalities of ERP systems, or ERP building blocks.
3. Create a detailed mapping how PI's future workflows, practices, input/output needs, and roles-distributions can be implemented in software/ERP.
4. Devise TORs for PI's future ERP system based on aforementioned analysis, and mapping, with a focus on a **globally compatible accounting system which needs to be implemented in early 2022, and should be the first building block.**

Approach

Achieving the objectives for this consultancy will require a participatory approach, and finding a suitable ERP-system/ERP building blocks should start with an analysis of PI's practices. In particular the assessment of needs, existing tools, practices, and capabilities of all PI offices will require group and individual self-assessment through desk review and (online) interviews with PI staff. In general, the whole process shall guarantee appropriate participation and consultation

with all PI offices worldwide, including discussions on language requirements and barriers. Relevant data regarding PI's organizational structure, and workflow practices are already available from previous assessments, and can be built upon for this consultancy.

PI works with qualitative, and some quantitative data. Therefore the consultancy will require a creative systematization of comparable inputs and outputs. Deploying a workflow, and functionalities which reflect both PI's current (legacy) practices, incorporate improvements which have been coordinated with PI staff, MT, and the consultancy (also based on requirements to better fit existing ERP workflows) should guarantee a successful implementation of PI's ERP system.

Details on the ERP System functionalities

PI is committed to, and prioritizing open source solutions, and open standards to improve information exchange, ownership, choice, security, privacy, workflow, auditability, and (upgrade) compatibility. While the requirements of the future ERP system will ultimately be defined by the aforementioned analysis, we would expect that the ERP system should have those fundamental qualities:

1. scalable, and secure
2. intuitive, easy to use, and with workflow guidance (e.g. step-by-step)
3. available in at least the 3 official languages (EN, ES, FR) with the capacity to easily switch between them and the option to add more languages
4. implemented as web-service, with possibility for offline use of the modules
5. Documented, and maintained by a professional provider
6. flexible, allowing complex role, and responsibility mapping, backed by a central, proven, widely-deployed, and versatile user authentication, and authorization system
7. logging of key activities to support monitoring, troubleshooting, and facilitating reporting for audits
8. affordable, and plannable upgradability. This could be guaranteed by:
 - a) relying on actively developed open source solutions, or professionally managed, closed-source solutions, with a proven legacy for affordable (NGO) pricing
 - b) Using open standards for internal, and external storage, and exchange to guarantee availability for potential future migrations
 - c) resilience towards asymmetric upgrades of deployed ERP components, e.g. through a centralized API

Required functionalities of building blocks

The future ERP system should have the following building-blocks and functionalities. A more detailed description is part of this consultancy:

Financial Management building block

Reporting Human Resource Management

Administration / Asset management

Donor Management

Project Management

More information about the requirements will be discussed during the interviews.

Requirements, and desired qualifications of the consultant

1. Bachelor's degree in either information systems management, business information technologies, information technologies, computer science, or a related field; A combination with finances, accounting, social sciences, international affairs, international development, or a related field, also by experience, highly preferred.
2. Minimum 5-7 years of experience in planning ERP systems, preferably also for international Human Rights organizations (or a combination of education, training, and professional experience).
3. Flexibility to apply different assessment, and evaluation approaches and methodologies.
4. Experience in overseeing development, implementation, deployment, and management of a variety of ERP systems. Preferably experience with global, and decentralized organizations in that respect, or in combining different building blocks to a complete ERP system.
5. Fluency in English, both verbally and written. Working knowledge in at least Spanish and/or French is preferred. Translation/interpretation can be included in the proposal. However, it is highly desirable that the consultant(s) can be autonomous communicating in different languages without depending on interpretation.
6. Experience in the systematization of diverse, varied input-output activities, as well as workflows.
7. Ability to work remotely and to work effectively both independently and in conjunction with a globally dispersed team. This includes coordination with teams in different time zones.
8. Ability to multi-task, meet tight deadlines, and employ creative problem-solving.

9. High standards of integrity, professionalism, ethics, and respect for different cultures.
10. Previous experience in one or more of the thematic areas in which Protection International works, including human rights, freedom of expression, democracy promotion, civil society development, LGBTIQ rights, gender equality, and/or transitional justice, is preferred.
11. Ability to provide credentials of organizations which have implemented an ERP system with similar functionalities, and have a similar (decentralized, and global) structure like PI would be seen as a plus.

Deliverables

1. Create TORs for PI's future ERP system as detailed in this document
2. Report, which details:
 - a) main findings of the analysis
 - b) estimated budgets for Phases II, to V
 - c) mapping between PI's current practices, proposed improvements, and these practices' implementation in ERP
 - d) explanation why a certain strategy, and approach has been chosen to be the best option to improve PI's current practices, as well as why this strategy/approach is preferred to be implemented through PI's future ERP system
 - e) highlight potential obstacles, and provide possible solutions
 - f) highlight potential ERP systems, or ERP building blocks, and which core functionality could be covered by which building block
 - g) if applicable, detail core functionality which is currently not readily available, and would need to be custom developed

Timeframe and venue

In consideration of Covid-19 travel restrictions, the consultancy will be implemented remotely unless contextual conditions improve allowing for missions. Changing conditions must be discussed and agreed between the consultant(s) and PI.

An initial roadmap developed by PI considers that Phase I will be undertaken in a maximum of 2 months, from August 2021 to September 2021.

Application procedure

Interested experts shall send an offer before 1st of August 2021 to procurement.gt@protectioninternational.org detailing:

1. Details of, and explaining chosen strategies, and approaches of already conducted ERP planning, and TOR creation consultancies.
2. Profile of the consultant; specifically highlighting examples of other ERP systems planned and optionally supported in its development, piloting, implementation, and management.
3. Contact details of two references.
4. Estimated working days and fees and calendar of activities.

For further information, please contact cgoettfert@protectioninternational.org