



Terms of Reference

Information Management System (IMS)

(Programmes and M&E Systems)

Business Analyst

July 2021

1 Background to TREE AID

TREE AID is an international development organisation - founded in 1987 - that helps villagers living in the drylands of Africa unlock the potential of trees to reduce poverty and protect the environment. It currently has operations in 6 countries: Burkina Faso, Ethiopia, Ghana, Mali, Niger and Senegal with a turnover of £9m.

2 Background to TREE AID's current Information Management System (IMS)

Tree Aid is a fast growing international development NGO.

We are collecting and using increasing amounts of data for (a) project implementation, and (b) project monitoring. We need our data systems and processes to be 'fit for purpose', to deliver high quality outcomes.

Tree Aid currently use an RDS (Remote Desktop Server) for UK staff, and separate servers for (five) country teams. We are in the process of migrating the filing system across to Sharepoint and OneDrive (Microsoft Teams) in 2021.

Data currently collected by the Operations Team includes narrative reports in word, financial/statistical information in excel, digital monitoring forms in CSV format (stored on ONA website), GPS data for project site location and shape, photographs, case studies, and focus group discussions.

Data analysis and visualisation is limited to excel. We have started to look at developing processes and code (using R and Python) with groups of volunteers for data analysis. We are looking to improve data visualisation and dashboard functionality for project logframes and Key Performance Indicators (KPIs).

Our two primary needs are to:

- Automate and integrate incoming M&E data streams, storage and analysis
- Centralise project life cycle data (currently located across a range of platforms including Salesforce, Microsoft Teams and RDS), and link to Key Performance Indicators (KPIs)

2.1 Objectives of the Consultancy

- Develop a “Business Requirements” document, which will help Tree Aid better understand what our current Information Management needs are, and what our options are in terms of meeting those needs.
- Tree Aid will use the “Business Requirements” document to develop a ‘Request for Proposal’ and associated ‘Assessment Tools’. Tree Aid will approach a number of potential providers to explore generic and tailor made solutions for an “Information Management System”.

3 SPECIFIC TASKS

- Review current organisational information systems and processes.
- Review organisational information needs.
 - What does the Tree Aid “Information Management System” (IMS) need to do, how could it do it?
 - Help define requirements and prioritize these
 - Which are our most mature business processes?
- Identify and prioritise technical and functional requirements; considering IT and databases, data management, and knowledge management (KM) systems (i.e. dashboards) currently being used.
- Get feedback and approval on requirements
- Focus on ‘Process consistency’.
- Provide a summary of emerging findings for TREE AID (presentation)
- Address comments/feedback from TREE AID
- Prepare a draft “Business Requirements” document
- Address comments/feedback from TREE AID
- Submit final “Business Requirements” document

Additional Output

- We would ask the consultant to document a few examples of how similar, peer organisations have developed their Information Management Systems (IMS). This could include a comparison with a larger INGO, and an INGO of similar size; or perhaps a comparison with a highly agile and decentralized INGO compared to a centralized and HQ heavy INGO. The precise parameters of this output to be agreed with the successful applicant.

4 SCOPE OF WORK / AVAILABLE BUDGET

We anticipate the work to take between +/- 15 days.

5 KEY DELIVERABLES

(To be finalized in conjunction with Operations team)

Deliverable	Submission date
Presentation of emerging findings (presentation)	
Draft report	
Final report	

5.1 Outline Structure of the Final Report

(To be finalized in conjunction with Operations team)

30 pages maximum with clearly separated sections.

6 PROFILE OF THE CONSULTANT(S)

6.1 Essential

- Experience of business analysis and / or a qualification in the subject or related methodology.
- Good working knowledge of electronic case management systems and management information systems within an international development setting
- Knowledge and understanding of how business processes can be improved
- Understanding of current and general International Development issues
- Understanding of business goals, resource effectiveness and operational efficiency in relation to International Development NGOs.
- Excellent communication and interpersonal skills.
- Attention to detail and strong focus on accuracy.
- Sound knowledge of issues relating to information security and data protection.

- Committed to equal opportunities and anti-discrimination practice in employment and service delivery.
- High level of IT literacy.
- Strong facilitation and presentation skills.
- Spoken and written fluency in English.

6.2 Desirable

- Experience of project management and / or a qualification in a project management methodology.
- Experience and / or a qualification in Monitoring, Evaluation and Learning (MEL) frameworks
- Spoken and written fluency in French.

7 RESPONDING TO TOR

In order to respond to this TOR, please submit the following:

- A technical proposal (max. 8 pages) outlining approach and methodology
- A detailed financial proposal
- Work plan (breakdown of days per task and days per consultant)
- CVs of proposed personnel with company referees

The above information must be submitted via email to: david.baines@treeaid.org.uk

The deadline for responses is: **9am Friday 30th July 2021**