Terms of Reference

<table>
<thead>
<tr>
<th>Title of the consultancy</th>
<th>Development of a centralised information management system</th>
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<tr>
<td>Main HQAI focal point</td>
<td>Mirela Le Dortz</td>
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<td>Reporting to</td>
<td>HQAI Senior Management Team (SMT)</td>
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Introduction

I. The Humanitarian Quality Assurance Initiative

The Humanitarian Quality Assurance Initiative (HQAI) is a not-for-profit organisation whose objective is to improve the Quality and Accountability of humanitarian and development organisations through the provision and promotion of meaningful and adapted independent quality assurance. Its services are intended to build capacity in the sector and provide consistent measurable data in the delivery of quality action, thus improving principled, accountable, efficient provision of aid.

To all its stakeholders, HQAI is an accountable, open and trustworthy partner, which applies the internationally recognised ground rules of auditing that are impartiality, competence, responsibility, openness, confidentiality and responsiveness to complaints. Our policies, procedures and tools for independent quality assurance follow relevant ISO standards. HQAI certification scheme is accredited under ISO/IEC 17065 - Conformity Assessment Requirements for bodies certifying products, processes and services (2012).

HQAI has developed robust tools to measure efficiently where an organisation stands in relation to the Core Humanitarian Standard (CHS) on Quality and Accountability. Tools related to other standards may be developed in the future.

II. Background and scope

HQAI’s core business is to provide auditing services. This activity produces data that is currently managed through several unconnected excel sheets, thus requiring duplication of efforts to fill in the data and making it difficult to effectively retrieve information. To make the data management more efficient and less prone to mistakes, HQAI has decided to develop an information management system centralising the data and make it directly usable for the follow-up of audits, as well as for administrative and reporting purposes.

Over the last two years, HQAI has worked internally on the development of this IMS using FileMaker Pro. However, changes of staff and a growing activity impede HQAI’s capacity to deal in house with the development of its data management platform. HQAI is therefore looking for a consultant able to finalise this project.
HQAI works in an Apple MacIntosh environment. Most of its partners don’t. The system generally, as well as its important export and import functions should therefore consider the compatibility to work on both Mac and PC environments.

III. Objectives

The overall objective of this assignment is to:

• Analyse the information needs at HQAI and identify the best solution, both in terms of cost and efficiency, to respond to these needs. In particular, the consultant should assess whether to:
  • finalise the IMS based on the current draft
  • start from scratch using the FileMaker pro platform
  • adapt one or several readily available solutions
  • change platform and develop the IMS based on a different solution(s).
  • adopt a combination of the above.

• Complement/develop and implement an IMS to be used internally, based on the broad characteristics identified below.

• Assess costs for the integration and management of audit results as part of the IMS (either directly integrated or as separate modules). This development would be a separate project at a later point of time.

Stage 1: Assessment

• Assist HQAI in the fine definition of the services expected from the IMS.

• Assess the extent to which the current draft IMS can be finalised to deliver these services or whether new solutions are to be developed.

• Suggest a comparison of the different relevant solutions, including development and running costs (financial and human resources).

• Produce a synthetic report highlighting the pros and cons of the different options and recommendations for the development of the IMS per se.

• Timeframe: three weeks from the beginning of the project.

Stage 2: IMS development

Develop and implement the IMS in two phases:

1. Organisations and contact management, operational at the end of Q2 2020.
2. Audit follow-up and management, including the data interface between the quality assurance and the administration teams, operational at the end of 2020.

The development of the IMS should be accompanied by the development of a comprehensive user manual.

Stage 3: Training

Train HQAI staff on the use of the IMS, including good data management practices, at the time of the implementation of each of the two phases.

Stage 4: Further development

Assess the feasibility (at reasonable costs) to integrate the management of audit results into the IMS with the view to produce audit reports semi-automatically, to be possibly developed in 2021.

IV. Characteristics

The end result should:

- be as user-friendly as possible;
- not require high resource for its usage and maintenance;
- clearly identify roles and responsibilities in the use and maintenance of the system;
- respond to the highest data protection standards;
- be easily upgradable.

V. Deliverables

The consultant is expected to deliver the following key outputs before the end of the assignment:

- A synthetic report highlighting the pros and cons of the different options and recommendations for the development of the IMS per se;
- The information management system;
- A user manual for use, editing and maintenance of the IMS;
- Delivery of two training workshops for HQAI staff;
- A proposal for the further development of the IMS (audit results management).
VI. Expected competencies

The successful contractor will have the following key competencies:

- Demonstrated experience in:
  - developing and managing a database/information system (IMS),
  - assisting clients in identifying the key characteristics of their IMS
- Capacity to work in, and understand the MacIntosh environment and FileMaker Pro
- Fluency in English (oral and written)
- Work approach with energy and positivity; openness to change and to managing complexities.

VII. Deadlines

- Expected start of services is March/April 2020.
- Expected first functional draft of the IMS with agreed upon functions by June 30th, 2020.
- The fully functional IMS and training of staff is expected by December 31st, 2020.

VIII. Proposal and date of submission

Qualified consultants/Firms are invited to submit a proposal which includes the following:

- Qualification and experience of the individual/firm;
- Company profile and copies of certificates of registration (for firms);
- Approach and methodology to undertake this assignment;
- Previous experience in similar assignment(s);
- Technical and financial proposal.

For interested consultants/firms a more detailed description of the characteristics of the IMS is available upon request. Please write to mledortz@hqai.org.

The proposal should be submitted before February 29, 2020 to mledortz@hqai.org.

Châtelaine, February 14, 2020