

GENERAL INFORMATION

Title of Consultancy: Project Lead and Information Management Advisor, Digital Platforms

Application Closing Date: 17 November 2023

Consultancy Start and End Date: up to 24 days over December 2023 – July 2024

Location of Consultancy: Remote

BACKGROUND

Transparency International (TI) is the global civil society organisation leading the fight against corruption. Through more than 100 chapters worldwide and an international secretariat in Berlin, Germany, TI raises awareness of the damaging effects of corruption and works with partners in government, business and civil society to develop and implement effective measures to tackle it.

The Transparency International Secretariat (TI-S) in Berlin has developed a CRM application (using Salesforce software) to support national chapters to manage information securely and efficiently. The web-based application has the following purposes:

1. Provide a case management system to record corruption reports and actions taken when managing cases of corruption ('case management platform')
2. Provide data analytics and advocacy tools (eg visualisations) to support the chapter's broader anti-corruption activities.

The application has been deployed to 40 TI National Chapters, who each have their own installation of the application (on their own Salesforce.org account). There are two different versions of the existing CRM application. TI-S has developed SOPs and guidelines for data entry, processing, sharing and reporting, and technical support documentation (eg Excel sheets to support data transfer).

TI-S has developed an update to the core CRM application ('Core Update'), which will be tested and then deployed to 40 TI National Chapters in 2024. This will ensure all TI National Chapters are using the same version of the CRM application.

TI-S has also developed a multi-country data pilot on land corruption ('Data Pilot'), that will be tested and deployed to seven TI National Chapters in 2024 as an additional feature of their Core Update.

TI-S is seeking a consultant specialised in Information Management and/or Information Technology who will lead deployment of the Core Update and Data Pilot. The consultant will be responsible for overseeing the project, and meeting the project deliverables and outcomes. The consultant will be the central contact point for TI-S and TI National Chapters.

OBJECTIVES

1. Overall project lead; acting as a focal point for the project team (comprising IT developers and TI-S staff from the IT and content-lead teams), ensuring both the Core Update and Data Pilot deployed effectively to TI National Chapters, and ensuring the project completes its objectives and deliverables on time and within budget.
2. Finalise a high-level implementation plan covering the testing and roll-out phases (based on a draft developed by TI-S)
3. Contribute towards testing the Core Update and Data Pilot, through
 - a. supporting data transfer into the platforms; and
 - b. undertaking targeted testing of the platforms

4. Lead the testing of the Core Update with 3-5 national chapters to develop a 'proof of concept', covering its application to two different instances of the Salesforce application that are used by TI National Chapters
5. Coordinate and provide logistical support for 40 TI National Chapters to adopt the Updated Core by July 2024. (Please note that technical support for data migration and platform customisation will be provided by the IT developer and TI-S IT team.) This includes communicating clearly with TI National Chapters about the process, timeline, and their input required; and drafting a document sharing with TI National Chapters the changes included in the Core Update.
6. Lead the testing of the Data Pilot with 1-2 national chapters to develop a 'proof of concept'
7. Coordinate and provide logistical support for seven TI National Chapters to adopt the Data Pilot by July 2024. The Data Pilot will be deployed at the same time as (or shortly after) the Core Update is deployed. (Please note that technical support for platform customisation will be provided by the IT developer and TI-S IT team. Data migration is not required.) This includes updating/finalising a draft document outlining the Data Pilot, which will be shared with TI National Chapters.
8. Updating of SOPs and guidelines for data entry, processing, sharing and reporting, in addition to technical support documentation (eg Excel sheet for data transfer). (Recognising that the extent of this work is lower priority than objectives 1-7, and would depend on available budget.)

EXPECTED DELIVERABLES AND TIMELINE

Upon commencement, and no later than 13 December 2023	Handover briefings with TI-S and IT developers
Week beginning 15 January 2024	Update meeting with TI-S covering testing results of Core Update and Data Pilot; and updated implementation plan (covering pilot and roll-out phases for the Core Update and Data Pilot).
1 March 2024	<p>Pilot-phases achieved for Core Update and Data Pilot.</p> <p>Update meeting with TI-S and IT developers covering proposed changes to the Core Update and/or Data Pilot (following the pilot phases); approach for the roll-out phases; and updated implementation plan (covering the roll-out phases for Core Update and Data Pilot).</p> <p>Draft a document communicating to TI National Chapters the changes included in the Core Update, for TI-S to review and send to all chapters who will receive the Core Update.</p> <p>Update/finalise a (currently draft) document outlining the Data Pilot, for TI-S to send to the chapters adopting the Data Pilot.</p>
31 May 2024	Draft report sent to TI-S covering progress against all objectives

31 July 2024

All objectives completed (noting caveat above on Objective 8);
final report sent to TI-S covering progress against all objectives

All presentations and reports are to be submitted in English, in electronic form, in accordance with the deadlines stipulated above. The Consultant is responsible for editing and quality control of language. The TI Secretariat retains the sole rights with respect to all distribution, dissemination and publication of the deliverables.

SELECTION CRITERIA

The Consultant should have the following qualifications:

- University degree or professional qualification in Information Management, IT, programming or other relevant fields
- 8+ years of relevant experience working in Information Management and Information Technology roles, with 3+ year of experience leading project teams
- Knowledge of CRM systems (Salesforce) and platforms
- Experience with data analysis.
- Excellent organizational skills and ability to effectively manage priorities and projects in a fast-paced and dynamic environment
- Ability to work independently whilst ensuring open, regular, and pro-active reporting and accountability to peers and team manager
- Highly developed teamwork and intercultural communication skills
- Commitment to the values and principles of Transparency International
- Fluent in English, additional languages (in particular Spanish, French and/or Arabic) an advantage

REMUNERATION AND COSTS

The Consultants should provide their estimated total fee as a lump sum for the whole project (estimated at 24 days over December 2023 – July 2024), or as standard daily or hourly rates, before any VAT or other charges.

For Consultants based in the EU, EEA and Switzerland

Transparency International e.V. (Secretariat), (TI-S) is registered as a Business Entity in Germany with VAT identification number DE273612486. In order to determine the Value Added Tax (VAT) implications of this tender, we kindly request that Consultants fill out the **VAT Form for Tenders/Vendor Form** (instructions inside the form) and submit the completed and duly signed form along with their email application.

The link to the VAT Form for Tenders/Vendor Form is available below.

CONTACT INFORMATION

The application should include the following documents in English:

- Short motivation letter (including quotes/daily rate) and Curriculum Vitae
- Completed VAT Form for Tenders (**Only for Consultants based in the EU, EEA and Switzerland**)

Please indicate “Project Lead and Information Management Advisor, Digital Platforms” in the subject line of your email application. Applications should be sent in English by email to Alison Matthews at DigitalALAC@transparency.org by close of business of 17 November 2023.

Please note that only shortlisted applicants will be contacted.

Data protection

When you respond to this tender and submit your application, you provide consent that Transparency International e. V. keeps your application materials for the period of ten years according to German legal requirements. Afterwards Transparency International will delete your application and any personal data included in it. If you have any questions please reach out to dataprotection@transparency.org

Guidelines for handling overhead and travel expenses

1. Overhead

Regular overhead expenses associated with the Consultants maintaining their place of business, such as rent, telephone, utilities or stationary, are included in the Consultant's professional fee, except where explicitly agreed otherwise in the contract.

2. Travel

- 2.1 Travel and accommodation expenses will as far as possible, and where applicable, be recovered from the institutions and companies hosting events or using the outputs provided by the Consultant.
- 2.2 Where such cost recovery is not possible, all travel is subject to prior approval by TI-S staff responsible for the financial management of the Project or TI Budget Line that will support the costs of travel. TI shall not issue travel advances to the Consultants. For accommodation or travel by air, rail or coach, they will instead have to contact TI-S that will make travel arrangements on the Consultant's behalf.
- 2.3 All travel booked by TI-S will include **travel health and accident insurance** with worldwide coverage and Economy class only; accommodation will aim to achieve best value for money up to a 4-star category.
- 2.4 Consultants shall be entitled to invoice TI-S **only** for local transportation and visa cost (if applicable).
- 2.5 Subsistence allowance (per diems) and expenses for individual meals cannot be claimed. These are part of Consultant's business expenses.