



CARIBBEAN POLICY DEVELOPMENT CENTRE
CONSULTANCY TO REVIEW AND UPGRADE
CPDC FINANCIAL MANAGEMENT PROCEDURES MANUAL

Request for Applications for Consultancy for the Review of CPDC Financial Management Procedures Manual

Call for Applications

Description: Consultant to review CPDC Financial Management Procedures

Location: Regional

Nature of the Consultancy: The Consultancy may be undertaken by an individual or corporate candidate

BACKGROUND

The Caribbean Policy Development Centre is a legally registered non-profit organisation headquartered in Barbados and established in 1991. CPDC serves as a regional umbrella NGO for organisations located across CARICOM. Our main modalities are research, advocacy, publications, public education, and institutional strengthening.

To continue the efficient fulfilment of its mandate and promote best practices, the CPDC wishes to engage the services of a qualified Accountant who will be charged with reviewing and upgrading the financial management systems within CPDC and making recommendations/changes for enhanced financial reporting and process management.

The Terms of Reference is attached in Annex 1.

GUIDELINES FOR APPLICATIONS

Interested persons are requested to submit the following:

- A cover letter to the attention of the Officer-In-Charge, Caribbean Policy Development Centre
- A copy of the applicant's Curriculum Vitae

Submissions are to be sent to the Caribbean Policy Development Center via electronic mail – cpdcsubmissions@gmail.com or cpdc@caribsurf.com with the subject line: Consultant to Review and Upgrade CPDC Financial Management Procedures Manual.

All applications must be submitted by 5:00 p.m. (UTC/GMT-4) on **4th August 2023**.



CPDC will respond to the successful applicant(s). Only persons meeting the criteria outlined in the Terms of Reference should apply.

Annex I

Caribbean (NGO) Policy Development Centre

Terms of Reference

Consultancy to Review and Upgrade CPDC Financial Management Procedures Manual

1. BACKGROUND

The Caribbean Policy Development Centre (CPDC) is a legally registered non-profit headquartered in Barbados and established in 1991. CPDC serves as a regional umbrella NGO for organisations comprising of small farmers, women, youth, Indigenous People, rural populations and faith-based organisations located across CARICOM. CPDC also has strong networking partnerships with organisations of persons with disabilities, artisans, micro entrepreneurs, human rights, and workers. Altogether it serves some thirty-five (35) regional, sub-regional and national (local) NGOs working at the grassroots level in economic, social, and cultural areas in the Caribbean. The Centre also has working relations with many other NGOs and development partners across the region.

The organisation was mandated to work with NGOs and civil society to understand how policies affecting Caribbean people are made; to share information about policies and decision-making processes; to work to influence and bring change to the developmental process, and to support and to lobby for policies which improve the lives of Caribbean people. In fulfilling its mandate, CPDC seeks to build the confidence and the ability of the Caribbean peoples to influence public policy. Our main work modalities are research, training, advocacy, publications, public education, and institutional strengthening. CPDC is officially recognised, both regionally and internationally, as the principal representative of Caribbean NGOs working with CARICOM/CARIFORUM, Commonwealth Foundation, and UN System Agencies.



In partnership with the European Union, the Caribbean Policy Development Centre is undertaking a joint 2-year grant partnership from March 2021 – June 2023. The project covers seven CARICOM countries: Antigua and Barbuda, Barbados, Dominica, Grenada, Saint Lucia, Saint Kitts and Nevis, Saint Vincent, and Grenadines. The project will build the Non-Governmental Sector’s capacity in the Caribbean by implementing a number of specific actions. These actions focus on strengthening NGOs’ capacity to provide key development solutions to vulnerable groups affected by the COVID-19 pandemic. These actions include activities that promote NGO’s institutional and organisational capabilities through a number of core thematic areas:- addressing the legislative environment through advocacy programming, promoting greater transparency within the sector, project management skills development, enhanced regional policy dialogue and improving access to small grants to name a few.

The project European Union/CPDC partnership comes against a background of “the multidimensional impact of the COVID-19 pandemic on marginalised social sectors, requiring development support, critical CSO interventions to achieve sustainable development. However, the meaningful participation of CARIFORUM civil society has been stymied by two main factors; the lack of capacity to effectively engage in the COVID-19 policy process and the lack of an institutionalised mechanism to facilitate dialogue between civil society and CARIFORUM governments. This action is therefore intended to implement activities to address these challenges.

PURPOSE AND OBJECTIVES

CPDC desires to undertake a contractual agreement with a consultant to review and update its existing financial management procedures and systems. This will involve an examination of CPDC’s Financial Procedures Management Manual to enhance and refine the financial management of project reporting.

General Objectives

- Review and upgrade CPDC’s financial management systems within CPDC and provide recommendations for enhanced financial reporting and process management.

Specific Objectives



- To review the CPDC's financial procedures manual and provide recommendations for process improvements in keeping with its project/programme management reporting needs as a development organisation.
- To advise on the human resources required to adequately implement and manage the revised management process as outlined in the recommendations.
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- To finalise the manual, update the CPDC's financial procedures manual based on the approved recommendations by the Centre, including practical process templates
- To facilitate a briefing session with CPDC's team to introduce and familiarise relevant officers with the updated manual and corresponding procedures.

2. DURATION OF THE ASSIGNMENT

The Consultancy is estimated to take approximately twelve (12) working days over the period 10th August 2023 to 6th September 2023.

3. PROFILE, QUALIFICATION AND SKILLS

The Consultant is expected to have the following qualifications/specialised knowledge/experience required to complete the tasks:

- A certified accountant designated by the Association of Chartered Certified Accountants (ACCA), Certified Management Accountant (CMA) or a related internationally accredited designation.
- Sound knowledge and understanding of the financial reporting requirements within the Development and NGO sector in Barbados or the wider Caribbean.
- At least three (3) years of experience providing financial management services to NGOs and/or development actors.
- Excellent research, report writing, presentation and analytical skills; and
- Previous experience developing templates, financial manuals and other related materials will be an asset.

4. DELIVERABLES

The Consultant is expected to produce the deliverables as below:

- A work plan including a schedule of actions to be undertaken.



- A review of relevant documents and processes related to the organisation's financial system and procedures currently in place.
- A rapid assessment of the current financial systems and processes.
- A Draft revised procedures manual that includes, but is not limited to, operational description/procedures for the following areas:
 - Reporting requirements
 - Procurement System for contracts (service contracts, technical assistance, supplies contracts, and work contracts) and methods of Procurement
 - Procedures: Income and Expenditure (donors, membership fees)
 - Budgeting
 - Accounting procedures
 - Disbursement request protocols
 - Internal controls
 - Systems of accountability
 - Internal and External Audit
 - Financial Principles
 - Financial Management Structure and reporting lines
 - Financial Monitoring (of sub-recipients)
 - Asset Management System
- One final procedures manual with enhanced financial management systems which include templates for strengthening CPDC's financial management systems to manage increased levels of resources.
- Provide orientation for all relevant staff to the new manual.

5. CONFIDENTIALITY AND OWNERSHIP OF FINAL OUTPUT

All information pertaining to this Consultancy shall remain the property of the CPDC who shall have exclusive rights over their use. The information shall not be disclosed to the public nor used in any form without written permission from the CPDC. The Consultant has no legal claim on any reports or products resulting from this assignment for which payment has been duly made.

6. ADMINISTRATION

The Consultant shall report to the CPDC Officer in Charge or his designate.

All applications must be submitted by 5:00 p.m. (UTC/GMT-4) on **4th August 2023**.