CONSULTANCY TO
DEVELOP SOFTWARE FOR FINANCIAL GRANT REPORTING
BY CARIBBEAN NGOs

Request for Applications for Consultancy to Develop Software for Financial Grant Reporting by Caribbean NGOs

Call for Applications

Description: Consultancy to Develop Software for Financial Grant Reporting by Caribbean NGOs

Location: Barbados

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

BACKGROUND

The Caribbean Policy Development Centre is a legally registered non-profit organization 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.

The CPDC wishes to engage the services of a Software Developer to assist in financial grant reporting for Caribbean NGOs, ensuring accuracy, compliance, and efficiency in budget tracking, documentation verification, and variance analysis, as we execute our mandate.

The Terms of Reference is attached at Annex 1.

GUIDELINES FOR APPLICATIONS

Interested persons are requested to submit the following:

1. Technical Proposal (max 6 pages):

- Detailed methodology, Software development framework, and work plan.

- Approach to designing budget modules, document verification and variance analysis.

2. Team Profile

- A one-page summary of each key team member's qualifications, emphasizing experience in AI/ML development, financial systems, and NGO workflows.

- Full CVs of all consultants (attached as an Appendix).

3. Financial Proposal

- Itemized budget covering software development, testing, training, and contingencies.

4. Value-Added Elements (optional):

- Examples of similar projects
- Strategies for rapid deployment within the condensed timeline (April 1 – June 20, 2025).

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: Consultancy to Develop Software for Financial Grant Reporting by Caribbean NGOs.

All applications must be submitted by **5:00 p.m. (UTC/GMT-4) on 30th March 2025.**

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

CARIBBEAN POLICY DEVELOPMENT CENTRE

TERMS OF REFERENCE

DEVELOPMENT OF SOFTWARE TO FACILITATE FINANCIAL GRANT REPORTING FOR CARIBBEAN NGOs

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I. BACKGROUND

The Caribbean Policy Development Centre (CPDC), a regional non-profit headquartered in Barbados, works to strengthen the capacity of Caribbean NGOs and civil society organizations (CSOs) to influence policy and deliver sustainable development services. A critical challenge faced by NGOs in the CARIFORUM region is the cumbersome, error-prone process of financial grant reporting, which often involves manual data entry, disjointed documentation, and compliance risks.

With support from the European Union (EU), CPDC is implementing the project *"Enhancing CARIFORUM's CSO Capacity to Participate in National and Regional Development Programming and Policymaking."* A key component of this initiative is leveraging technology to streamline financial reporting processes, reduce administrative burdens, and improve compliance with donor requirements.

This consultancy seeks to design and deploy software to automate financial grant reporting, enabling NGOs to efficiently manage budgets, validate documentation, and generate accurate reports.

II. PURPOSE AND OBJECTIVE

General Objective

To develop software that assists financial grant reporting for Caribbean NGOs, ensuring accuracy, compliance, and efficiency in budget tracking, documentation verification, and variance analysis.

Specific Objectives

1. **Automated Budget Management**:

    - Design a user-friendly interface for NGOs to build, upload, or modify budgets in Excel spreadsheets.
    - Include columns for forecasted Cost Centre, total budget, actual expenditure, variance (numerical and percentage), in-kind contributions, and co-financing.
    - Enable auto-calculate totals for sub-budget lines and major budget categories.
2. **Software Driven Document Verification**:
    - Develop modules to scan uploaded invoices, receipts, and supporting documents to validate:
        - Presence of required details (invoice/receipt number, date, vendor address).
        - Consistency between invoices and receipts (e.g., matching amounts, dates).
    - Flag discrepancies, missing data, or non-compliant documentation for user review/approval/disapproval.
3. **Variance Analysis and Reporting**:
    - Automatically compute variances between forecasted and actual budgets.
    - Generate visual dashboards and exportable reports highlighting variances in numerical values and percentages.
4. **Compliance and User Accessibility**:
    - Ensure compatibility with donor templates (e.g., EU, UN agencies).
    - Optimize for NGOs with limited technical expertise, including multilingual support (English, Spanish, Dutch).
5. **Data Printing/Reproduction:**
    - Enable ability to print by sub-category, entire financial report, general ledger and all outputs should be compatible and exported via Microsoft Excel format.

III. INSTITUTIONAL PROFILE/CONSULTANCY REQUIREMENTS

Qualifications and Experience

- Degree in Computer Science, Data Science, Financial Management, or a related field.
- Familiarity with grant reporting frameworks and compliance requirements for international donors (e.g., EU, UN).
- Prior work with NGOs or public-sector financial systems in the Caribbean (preferred).

IV. DURATION

The consultancy will run from April 1, 2025 – June 20, 2025, with the following accelerated milestones:

Phase	Timeline	Key Activities
Inception & Design	April 1 – April 15, 2025	Finalize requirements, software model design, and user interface prototyping.
Development	April 16 – May 31, 2025	Build software modules, integrate budget tools, and develop compliance features.

Phase	Timeline	Key Activities
Testing & Deployment	June 1 – June 20, 2025	Pilot testing, user training, system refinements, and final deployment.

V. DELIVERABLES

1. **Inception Report** (by April 10, 2025):
    - Technical architecture, software map/model specifications, and UI/UX design.
2. **Alpha Prototype** (by May 15, 2025):
    - Functional software verification and budget management modules.
3. **Final Software Delivered** (by June 15, 2025):
    - Deployable software solution with variance analysis, dashboards, user guides, and training materials.
4. **Project Completion Report** (by June 20, 2025):
    - Evaluation of outcomes, scalability recommendations, and maintenance plan.

VI. ADMINISTRATION

The Consultant will report to the CPDC Executive Director and/or his designate.

VII. INTELLECTUAL PROPERTY

All software, code, and documentation produced under this consultancy will be the exclusive property of CPDC.

VIII. APPLICATION GUIDELINES

Submission Requirements

- Technical proposal detailing methodology, framework, and timeline (max 8 pages).
- CVs of key team members, highlighting software (required) and financial system experience (optional).
- Budget proposal (including software licensing, testing, and training costs).
- Examples of similar projects (e.g., tools for financial compliance).

Deadline: **March 30, 2025**, at 5:00 p.m. (UTC/GMT -4).
Submit to: cpdcsubmissions@gmail.com with the subject line: *"Financial Software Reporting Consultancy."*