CARIBBEAN POLICY DEVELOPMENT CENTRE

Consultancy for the Technical Build-Out and Operationalisation of an AI-Enabled Institutional Management Software Package for Caribbean NGOs

CALL FOR APPLICATIONS

Description: Consultancy for the Technical Build-Out and Operationalisation of an AI-Enabled Institutional Management Software Package for Caribbean NGOs

Location: Remote

Nature of the Consultancy: The consultancy may be undertaken by an individual consultant, a team of consultants, or a corporate body with the requisite expertise and experience.

BACKGROUND

The Caribbean Policy Development Centre (CPDC), established in 1991 and headquartered in Barbados, is a legally registered non-profit organisation and regional umbrella body for civil society organisations across CARICOM. CPDC supports civil society through research, advocacy, training, public education, publications and institutional strengthening.

Many Caribbean NGOs manage small- to medium-sized projects with limited financial, technical and human resources and may not have access to practical digital systems for project management, financial management, monitoring and evaluation, document retention and reporting. CPDC has developed the functional concept and will provide the approved workflow and interface requirements for a simple, user-friendly and affordable capacity-building hub that can securely support multiple NGO organisations.

The Consultant will undertake the technical build and implementation of the hub based on CPDC's approved requirements. The hub will provide introductory tools for Monitoring and Evaluation (M&E), financial management, project management/work planning, narrative and financial reporting, document management and downloadable project outputs, together with AI-assisted functions that support users in carrying out these tasks. Appropriate safeguards must be included for accuracy, privacy, security, human review and separation of each organisation's data.

The Terms of Reference are attached as Annex 1.

GUIDELINES FOR APPLICATIONS

Interested applicants are requested to submit the following:

- A cover letter addressed to the Executive Director, Caribbean Policy Development Centre.

- A Technical Proposal outlining the proposed technical build and implementation approach, work plan, technology and AI approach, multi-organisation architecture, and arrangements for quality assurance, security, data protection, testing and deployment.
- A Financial Proposal providing a detailed costing of professional fees and all other estimated expenses against the proposed outputs and deliverables.
- A portfolio demonstrating experience in similar software, NGO management, M&E, accounting, project management, AI-assisted or related digital systems.
- A direct link to at least one (1) completed system, including a financial management system, application or demonstration that CPDC can access and review, together with a brief description of the applicant's role in the assignment, **will be considered an asset.**
- A one-page profile of each consultant or key expert proposed for the assignment, outlining relevant qualifications and experience, together with full curriculum vitae attached as an Appendix.
- Any relevant value-added services or features that would improve the accessibility, sustainability, security, usability or affordability of the final solution (optional).
- CPDC will require at least one (1) professional reference from shortlisted applicants to verify satisfactory performance on a similar assignment.

Submissions are to be sent to the Caribbean Policy Development Centre via electronic mail to cpdcsubmissions@gmail.com with the subject line: "Consultancy for the Technical Build-Out and Operationalisation of an AI-Enabled Institutional Management Software Package for Caribbean NGOs".

All applications must be submitted by 5:00 p.m. AST on 22 October 2026.

CPDC will contact the successful applicant(s). Only applicants meeting the criteria outlined in the Terms of Reference should apply.

Annex 1

Caribbean Policy Development Centre

Terms of Reference

Consultancy for the Technical Build-Out and Operationalisation of an AI-Enabled Institutional Management Software Package for Caribbean NGOs

BACKGROUND

The Caribbean Policy Development Centre (CPDC), established in 1991 and headquartered in Barbados, is a legally registered non-profit organisation and regional umbrella body for civil society organisations across CARICOM. CPDC works to strengthen civil society participation in development processes through research, training, advocacy, publications, public education and institutional strengthening.

With funding from the Global Environment Facility Small Grants Programme (GEF SGP), CPDC seeks to strengthen the capacity of Caribbean NGOs to manage small to medium-sized projects through the technical build and implementation of a practical AI-enabled capacity-building hub. CPDC will provide the approved functional flow, interface requirements and core system specifications. The initiative will support improved project planning and delivery, monitoring and evaluation, financial management, narrative and financial reporting, accountability and digital record-keeping.

Many small and medium-sized Caribbean NGOs operate with limited financial, technical and human resources and require systems that are simple to use, affordable and do not depend on advanced technical knowledge. The proposed hub will provide connected introductory tools for M&E, project management/work planning, budgeting and financial management, reporting and secure document management, and will support multiple NGO organisations through separate organisational accounts.

Each participating NGO should have access only to its own users, projects, financial records, M&E information, documents and reports, with secure login arrangements, role-based permissions and clear separation of organisational data. The system should include appropriate authentication and access-control protocols to protect user accounts and sensitive project and financial information. AI-assisted functions should be integrated across the hub to support users with routine project-management, M&E, financial-management, reporting and administrative tasks, while maintaining human review and organisational approval. The system must protect organisational and personal data and clearly identify any third-party AI services, subscriptions or ongoing costs.

PURPOSE AND OBJECTIVE

The purpose of the consultancy is to technically build, test and implement a secure, user-friendly, multi-organisation capacity-building hub, based on CPDC's approved functional flow and interface requirements, that helps Caribbean NGOs manage small- to medium-sized projects from planning and

budgeting through implementation, monitoring, financial management, document retention and narrative and financial reporting.

In this context, the Consultant will serve as an external contractor responsible for reviewing and confirming the technical requirements and then building, testing and implementing the hub based on CPDC's approved system design, workflow and interface specifications. The Consultant should have significant relevant experience in software development and organisational management systems, with experience working with NGOs or development organisations considered an asset.

General Objective

- To undertake the technical build and operationalisation of an AI-enabled capacity-building and project management hub, based on CPDC's approved requirements, that securely supports multiple Caribbean NGOs and provides practical tools for M&E, project/workplan management, budgeting and financial management, document management, and narrative and financial reporting.

Specific Objectives

- Review CPDC's approved functional flow and interface requirements and confirm the technical requirements needed to build and deploy the hub.
- Build and implement a secure multi-organisation hub in accordance with CPDC's approved functional flow, interface requirements and specifications, with integrated M&E, project/workplan, budgeting, financial management, reporting and document-management functions.
- Integrate AI-assisted functions that help authorised NGO users carry out routine project-management, M&E, financial-management and reporting tasks, including developing workplans, drafting reports, preparing M&E updates, supporting budget preparation, summarising project information and identifying missing or overdue information, while maintaining appropriate human review and approval.
- Enable NGOs to securely retain important project records and supporting documents, generate and download key project and financial outputs, and protect each organisation's data through secure login, user roles, permissions and access controls.
- Build user capacity through testing, training, documentation and full technical handover.

SCOPE OF WORK

The Consultant will be expected to undertake, at minimum, the following activities:

- Review CPDC's approved functional flow, interface requirements, workflows and reporting requirements, and clarify any technical matters necessary for implementation. Selected NGO users may be engaged for testing and usability feedback.
- Technically build a simple modular multi-organisation hub based on CPDC's approved functional flow, interface requirements and specifications, allowing multiple NGOs to use the same application while maintaining separate organisational accounts, users, permissions, projects, records and reports, supported by secure login and authentication protocols appropriate to the sensitivity of the data.
- Implement secure user-login and account-protection measures, including password controls, role-based access, account recovery, session management and, where appropriate, multi-factor authentication, with access logs or audit trails for sensitive administrative and financial actions.

- Develop an M&E and project management module covering project information, results, indicators, activities, workplans, tasks, responsibilities, targets, timelines, milestones, deliverables, progress updates, verification evidence and basic dashboards.
- Develop budgeting and financial management functions covering budget templates, budget-line costing, income and expenditure, project/funder tracking, payment vouchers, invoices, receipts, a general ledger, budget-versus-actual monitoring and project financial reports.
- Provide secure document management so NGOs can upload, link, retain and retrieve key project documents, including contracts, consultant final outputs, payment vouchers, invoices, receipts, output-verification documents and other supporting records.
- Provide narrative reporting and downloadable outputs, including project progress and final reports, workplans, budgets, M&E reports, financial reports and other approved outputs in practical formats such as PDF and Excel where appropriate.
- Integrate AI-assisted functions that help authorised NGO users carry out routine project-management, M&E, financial-management and reporting tasks, including developing workplans, drafting reports, preparing M&E updates, supporting budget preparation, summarising project information and identifying missing or overdue information, while maintaining appropriate human review and approval.
- Test the hub with CPDC and selected NGO users, including secure login and authentication, role-based access, multi-organisation data separation, financial calculations, report generation, document upload/retrieval and AI-assisted functions; incorporate feedback before deployment and provide training, manuals and full technical handover.

INSTITUTIONAL PROFILE / CONSULTANCY REQUIREMENTS

A. Qualifications

- A University degree in Computer Science, Information Technology, Software Engineering, Information Systems or a related field. A postgraduate qualification will be an asset.
- Relevant professional certifications in software development, database management, cloud technologies, cybersecurity, artificial intelligence, accounting systems, M&E or related disciplines will be an asset.

B. Experience and Knowledge

- At least seven (7) years of relevant professional experience in software or web application development, technical implementation and deployment, or demonstrably equivalent experience for a firm/team.
- Demonstrated experience with databases, multi-organisation or multi-tenant systems, secure login and authentication, role-based permissions, access controls, workflows, document management, dashboards, reporting and secure web-based applications.
- Practical experience integrating AI-assisted features into software applications to support user tasks, reporting, information retrieval or administrative assistance, with appropriate safeguards for privacy, accuracy, data governance and human review.
- Experience developing project financial-management functions, including budgeting, general ledgers, financial reporting and document-linked transaction records, and/or M&E and results-management functionality will be a strong asset.
- Experience developing financial or accounting functions and/or M&E and results-management functionality will be a strong asset.
- Experience developing simple, user-friendly systems for users with varying levels of technical capacity.

- Experience working with NGOs, regional organisations, development agencies or public-interest institutions in the Caribbean or comparable contexts will be an asset.
- Understanding of the operational realities of small and medium-sized NGOs and the need for maintainable, scalable and cost-effective technology solutions.

C. Skills and Abilities

- Excellent planning, organisational and time-management skills.
- Strong analytical, technical implementation and problem-solving skills.
- Excellent written and oral communication skills and ability to explain technical matters to non-technical users.
- Ability to translate CPDC-approved workflows and requirements into reliable and practical system functionality.
- Ability to accurately implement CPDC-approved interface requirements for users with varying levels of digital skills.
- Ability to document systems clearly and provide effective end-user and administrator training.
- Ability to deliver high-quality outputs in accordance with agreed specifications and timelines.

DURATION OF THE ASSIGNMENT

The consultancy will run over the period 29 October to 31 December 2026. The Consultant will propose a detailed work plan and implementation schedule as part of the Inception Report, for review and approval by CPDC.

DELIVERABLES

The Consultant will be required to complete and submit the following deliverables:

1. **Inception Report:** Setting out the Consultant's understanding of the assignment, methodology, work plan, implementation schedule and information/access requirements.
2. **Technical Requirements Validation Report:** Confirmation of CPDC's approved functional flow, technical requirements, recommended implementation approach, multi-organisation access and data separation, security/login architecture, document-management requirements and proposed AI-assisted functions.
3. **Technical Specifications and Working Test Version:** Technical specifications, workflows, multi-organisation account and permission structure, secure login and authentication approach, core module specifications, document-management approach, AI-assisted functions and a working test version built from CPDC's approved requirements and interface specifications for review.
4. **Integrated Capacity-Building Hub:** Completion of the M&E, project/workplan, budgeting and financial management, narrative reporting and document-management functions, including general ledger, downloadable outputs, agreed AI-assisted functions, dashboards, reports, permissions, organisational data separation and security controls.
5. **Testing and User Acceptance:** User testing with CPDC and selected NGO users, including secure login and authentication, role-based access, multi-organisation data separation, project workflows, financial calculations and reports, document upload/retrieval, downloads and AI-assisted functions, with identified issues corrected before final deployment.
6. **Fully Functional Hub, Training and Manual:** Deployment of the approved multi-organisation hub, practical training for designated NGO users and administrators, and a user/administrator manual covering secure login, password and access management, routine use, organisation and user administration, AI-assisted features, document management and basic troubleshooting.

7. **Technical Handover and Final Completion Report:** Complete handover of relevant source/project files, database and technical documentation, configuration and deployment information, administrator access, backup/recovery procedures, third-party service details and a concise final report on work completed and maintenance requirements.

PRESENTATION OF WORK

The Consultant will transmit work plans, reports, invoices, receipts and other outputs according to agreed specifications, established CPDC protocols and applicable industry standards. Draft deliverables will be subject to review and feedback by CPDC before acceptance. All final documentation should be provided in editable and accessible formats, in addition to any required final published format.

ADMINISTRATION AND REPORTING

The Consultant shall report to the Executive Director, CPDC, and will be expected to provide regular progress updates at intervals agreed during inception. CPDC may establish a small internal review team and engage selected NGO users to test the software. All major system architecture, production deployment and AI-functionality decisions will require CPDC approval before implementation.

The Consultant shall not use or expose production credentials, confidential organisational information or personal data for unauthorised purposes. Appropriate backups, test environments and security controls must be in place before production deployment.

CONFIDENTIALITY, DATA PROTECTION AND OWNERSHIP OF FINAL OUTPUT

The Consultant shall treat as confidential all non-public CPDC or participating NGO information, credentials, internal documents, financial information, data and systems accessed in the course of the assignment and shall use such information only for the purposes of completing the consultancy. The Consultant shall apply appropriate data-protection, privacy and security practices throughout the assignment.

All work developed specifically for CPDC under this assignment, including source code, system settings, manuals, databases and related project files, will become the property of CPDC once payment has been made. Any third-party software, licences, subscriptions, AI services or tools used must be clearly identified and approved by CPDC in advance.

The Consultant shall have no continuing legal claim over final outputs for which payment has been duly made and shall provide CPDC with the access, documentation and credentials reasonably required to operate, maintain and further develop the solution after handover.