CARIBBEAN POLICY DEVELOPMENT CENTRE

Consultancy to Develop and Implement an Integrated Workplan, Project Management and Financial Management System for CPDC

CALL FOR APPLICATIONS

Description: Consultancy to Develop and Implement an Integrated Workplan, Project Management and Financial Management System for CPDC

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 that functions as a regional umbrella body for civil society organisations across CARICOM. CPDC works with regional, national and community-based organisations and development partners through research, advocacy, training, public education, publications and institutional strengthening.

CPDC currently uses an internally developed workplan system to support staff planning, task management, timesheets and reporting. The system was developed using Replit and is in active use. CPDC now wishes to assess its current system and broader organisational requirements and develop an integrated solution that brings together workplan, project management and financial management functions.

The consultancy must begin with an assessment of the existing system and CPDC's operational needs. The Consultant may recommend enhancement of the current system, redevelopment or migration, or development of a new system. No approach is predetermined, and any recommended option must be approved by CPDC before implementation.

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 approach and methodology, understanding of the assignment, proposed work plan, technology approach, quality assurance, security and data-protection arrangements, and proposed approach to AI-assisted user and administrative support.

- 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 developing similar organisational management, project management, financial management or related software systems.
- A direct link to at least one (1) completed 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.
- Full curriculum vitae of each consultant/key expert participating in the assignment, attached as an Appendix.
- 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 to Develop and Implement an Integrated Workplan, Project Management and Financial Management System for CPDC".

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 to Develop and Implement an Integrated Workplan, Project Management and Financial Management System for CPDC

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.

To support internal planning and reporting, CPDC currently uses an internally developed workplan system built using Replit. The system supports aspects of staff work planning, task management, timesheets and reporting and is already in operational use.

CPDC now seeks to develop a more integrated organisational management system that brings together workplan, project management and financial management functions. The consultancy is not based on a predetermined technology or development approach. The Consultant will be required to assess the existing system, its data, workflows and hosting arrangements before recommending whether the existing system should be enhanced, redeveloped or migrated, or whether a new or hybrid solution should be developed. The solution should make practical use of AI to support users and authorised CPDC administrators, while keeping appropriate human review and approval over system and financial changes.

Any proposed approach must prioritise data integrity, security, usability, cost-effectiveness, maintainability and business continuity. Existing production data and records must be protected, and no material changes to the current production system should be made without CPDC's prior approval.

PURPOSE AND OBJECTIVE

The purpose of the consultancy is to provide CPDC with a secure, practical and user-friendly integrated system that supports staff work planning, project implementation, management reporting and financial management in one coordinated environment.

In this context, the Consultant will serve as an external contractor responsible for assessing CPDC's current system and organisational requirements and developing and implementing the approved solution. The Consultant should have significant relevant experience in software development, organisational management systems and system implementation, including experience with NGOs or development organisations.

General Objective

- To assess, develop and implement an integrated Workplan, Project Management and Financial Management System that improves CPDC's planning, coordination, monitoring, reporting and financial oversight, including appropriate AI-assisted user and administrative support.

Specific Objectives

- Assess CPDC's existing workplan system and organisational requirements and recommend the most appropriate development approach.
- Design and implement an integrated system for work planning, project management, financial management and organisational reporting.
- Ensure secure user access, reliable data management, appropriate approvals, reporting and audit trails.
- Preserve and migrate existing data where required and ensure continuity of CPDC's operational records.
  Recommend and implement an appropriate hosting and deployment arrangement, including compatibility with CPDC-managed server infrastructure and any continued use of Replit or other approved development environments, while maintaining secure data flows and business continuity.
  Implement automated daily backups, secure retention and an appropriate secondary/off-site backup arrangement. A backup must be taken before major deployments or database migrations, and restore procedures must be tested periodically to confirm that backups can be successfully recovered.
  Ensure authentication, database and AI credentials are stored securely in protected deployment settings and are not exposed in source code. Where authentication providers or user identities change, existing users must be carefully mapped so staff do not lose access to historical tasks, timesheets or records.
- Provide appropriate AI-assisted functions to help users find and understand system information and to help authorised CPDC staff manage routine system updates, administration and troubleshooting.
- Build CPDC's capacity to manage and sustain the system through training, documentation and full technical handover.

SCOPE OF WORK

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

- Review the existing workplan system, its current functions, database, workflows, reporting arrangements and technical environment, and assess CPDC's wider organisational needs.
- Recommend whether CPDC should enhance the existing system, redevelop or migrate it, or develop a new system, with clear reasons, costs, risks and sustainability considerations.
- Design and implement integrated workplan and project management functions, including tasks, assignments, timelines, deliverables, timesheets, approvals, supporting documents and management reporting.
- Design and implement financial management functions appropriate to CPDC's requirements, including project budgets, income and expenditure tracking, payment/voucher records and financial reporting.

- Provide role-based access, dashboards, audit trails, security controls, scalable document storage, and reporting/export functions, including downloadable PDF and Excel outputs where appropriate.
- Preserve and migrate existing data where required, with appropriate testing and verification before any production change or system replacement.
- Develop AI-assisted user features that, where appropriate, allow authorised users to search system information in plain language, summarise project/workplan and financial status, draft routine reports, flag overdue or missing information, and assist with data entry or document information capture for staff review.
- Develop an AI-assisted administrative support function to help authorised CPDC staff with routine system configuration and updates, user guidance, diagnostics and troubleshooting. The function should provide step-by-step assistance and, where safely designed, support approved changes to forms, templates, fields, dashboards or workflow settings without requiring developer intervention for routine tasks.
- Ensure that AI-generated information and proposed changes remain subject to appropriate staff review and approval. The AI function must not independently change system architecture, source code, user permissions or financial records without explicit authorised approval and suitable safeguards.
- Test the approved system, incorporate CPDC feedback, deploy the final solution 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, project management 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, systems analysis and implementation, or demonstrably equivalent experience for a firm/team.
- A successful track record in developing organisational management, project management, workplan, financial management or related business systems.
- Demonstrated experience with databases, user authentication, role-based permissions, workflows, reporting, file/document management and system integrations.
- Demonstrated experience in data migration, backup, recovery, security and production deployment.
- Experience designing financial management or budget-monitoring functions, including budget-versus-actual reporting and project financial tracking.
- Experience developing user-friendly dashboards, reports and export functions for management and operational users.
- Practical experience implementing AI-assisted functions in organisational or business systems, such as natural-language search, reporting/summarisation, guided data entry, workflow assistance, administrative support or troubleshooting, with appropriate security and human-approval controls, will be an asset.

- 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 non-profit organisations and the need for maintainable and cost-effective technology solutions.

C. Skills and Abilities

- Excellent planning, organisational and time-management skills.
- Strong analytical, diagnostic and systems-design skills.
- Excellent written and oral communication skills and ability to explain technical matters to non-technical users.
- Ability to translate organisational processes into practical and user-friendly system workflows.
- Ability to manage system migration, deployment and handover in a manner that protects existing data and business continuity.
- 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 01 November 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. **Existing System and Requirements Assessment:** Assessment of the current workplan system and CPDC's workplan, project management and financial management requirements, including options and a recommendation on whether to enhance, redevelop/migrate or replace the existing system.
3. **Approved System Design and Working Test Version:** Functional and technical specifications, system workflows and a working test version of the approved solution, including the proposed AI-assisted user and administrative support functions, for CPDC review before production deployment.
4. **Configured and Integrated System:** Completion of the approved workplan, project management and financial management functions, including dashboards, reporting, permissions, security controls, required integrations and approved AI-assisted user and administrative support functions.
5. **Testing, Data Migration, Backup and User Acceptance:** Testing of functionality, security, reports, PDF/Excel exports, data integrity, backup and restore procedures, authentication/user mapping and AI-assisted features; migration/preservation of approved existing data where required; and correction of identified issues before final deployment.
6. **Fully Functional Production System, Training and Manual:** Deployment of the approved system, practical staff training and a user/administrator guidebook covering routine use, administration, AI-assisted functions, system updates and basic troubleshooting. The Consultant should also provide short user-training videos or animated walkthroughs based on the approved guidebook/manual, where practical.

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, hosting/deployment information 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 for the assignment. All major system architecture, migration, production deployment and financial-management design decisions will require CPDC approval before implementation.

The Consultant shall not make unauthorised changes to CPDC's existing production system, delete or overwrite operational data, or expose production credentials. Appropriate test environments, rollback arrangements and verified backups must be in place before major migration or deployment activities.

CONFIDENTIALITY, DATA PROTECTION AND OWNERSHIP OF FINAL OUTPUT

The Consultant shall treat as confidential all non-public CPDC 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 approved designs, 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 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.