



CONSULTANCY TERMS OF REFERENCE

Main Facts Table	
RFQ reference	RFQ FY23 169 – BUSINESS AND ORGANISATION DESIGN REQUIREMENTS FOR NON-EMPLOYEE MANAGEMENT PRACTICE
RFQ launch date	6 th June 2023
Contract Manager	Keri Kamruddin- Head of Organisation Development & Strategic Business Partnering
Deadline for submission of offers	20th June 2023

Submission of offers to procurement@plan-international.org

Please include the RFQ reference “[RFQ FY23 169 – Business & Organisation Design Requirements for Non-Employee Management Practice](#)” number above in all correspondence

1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And it's girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 85 years, and are now active in more than 75 countries.

Read more about Plan International's Global Strategy: **Girls Standing Strong** at <https://plan-international.org/strategy>

About the commissioning office

This consultancy is commissioned by Plan International Global Hub, Plan Limited, which has overall accountability for delivery excellence across Plan International, in line with our global strategy.

2. Background/Context

Plan International Inc. (PII) relies upon the contributions of a variety of stakeholders to help realise its mission. PII works closely with a large number of non-employees i.e. volunteers, community supporters and partners who play a crucial role in day-to-day operations including data collection tasks. The new strategy of 'All Girls Standing Strong' suggests that this will continue to increase in the future with perhaps greater requirements for providing access to organizational systems as Plan looks to become more digitally connected and data driven.

Plan International currently do not have a system or governance framework for managing the non-employee journey. Practices may vary from office to office.

Plan International Global Hub is seeking a consultant to consultancy support the development of Non-Employee Management (NEM) practice, within PII, i.e. systems, people and set of processes to manage the lifecycle of non-employees, taking into consideration local laws and requirements. The consultant will work with the Strategic Leadership High Potential Programme (SLHPP) team to map current understanding of NEM across the organization and will then design a non-employee management practice (systems requirement, people/structure/roles and set of processes) that is required to support organizational efforts to improve digital data collection. This will help efficiency of Plan International Sponsorship and Monitoring & Evaluation processes as well as strengthening evidence and accountability of Plan International's work.

In the first year, it is estimated that for 26,000 accounts of Digital Data Collectors (DDC) will be targeted to design for and implement this practice around prior to scaling this effort to manage other non-employees in this organization in the next 2-3 years.

The management of this NEM group will require at a minimum the following:

- On-boarding\Lifecycle & process ownership for Non Employees (Working in conjunction with IT or NEM User Management Group)

- Policies and Standards \ Legal
- Appropriate pre-requisite training and tracking
- General duties of User Management Groups and enabling functions i.e. P&C, IT, Procurement, etc
- Roles\Process Changes and associated “change management” as part of the transformation for direct\indirect roles that are part of the paper data collection activities.

The NEM design and implementation will happen in two faces:

PHASE 1	Activities
	Consolidation of current practices Definition of roles and responsibilities Definition of requirements for a fit for purpose practice of NEMs
	Process design and mapping System selection
	Development of policies and procedures
	Identification of data management requirements
	Definition of users’ roles and responsibilities
	Determine implementation and operationalisation strategy
PHASE 2	Implementation of recommendations from Phase 1 and development of a broader volunteer engagement strategy. This would include targeted support for the Sponsorship revitalisation program. <u>This Phase will be delivered internally by Plan’s dedicated internal resources.</u>

NOTES:

- This consultancy’s scope of work only covers Phase 1. Phase 2 will be delivered by Plan’s internal staff.
- This consultancy will be carried out remotely. No travel is expected.

3. Description & Purpose

Purpose

The purpose of this consultancy is to understand the needs related to the non-employee practice requirements from the user management groups and the enabling and design a practice (systems requirement, people/structure/roles and set of processes) which is fit for purpose to implement first for the DDC accounts and then for scale for all non-employees in the organisation.

Methodology/ Questions

The management of this NEM group will require at a minimum the following:

- **On-boarding\Lifecycle & process** ownership for Non-Employees (Working in conjunction with IT or NEM User Management Group)
- **Policies and Standards \ Legal**
- Appropriate **pre-requisite training and tracking**
- General **duties of User Management Groups and enabling functions i.e. P&C, IT, Procurement, etc**
- **Roles\Process Changes and associated “change management”** as part of the transformation for direct\indirect roles that are part of the paper data collection activities.
- **NEM system** for management of non-employee data, process and decision making

The consultant will therefore carry out the following assessment and design work:

1. **Requirements Gathering:** Work with the non-employee user management groups to understand the needs and current practices and enabling functions for IT, Procurement, People & Culture to gather and document the requirements for a fit for purpose practice of NEMs.

2. **Process mapping & design and system selection:** Collaborate with relevant stakeholders to map out the current non-employee management processes and identify areas for improvement. Incorporate findings and recommendations from the Strategic Leadership High Potential Programme NEM group. Identify the workflows required to support partners and sponsorship volunteer's lifecycle management, which is enabled through processes and technology systems. Work with IT to support selection of appropriate NEM system based on the understanding of identified business requirements for partners and sponsorship volunteers.
3. **Policy & procedure development:** Collaborate with P&C, Legal and Global Assurance to develop and update policies and procedures related to management of non-Employees taking into consideration any relevant local laws and regulations.
4. **Data management:** Work with stakeholders (P&C, IT, Data Privacy team) to identify data requirements and ensure these are in line with Plan's Global Data Privacy policy and local laws.
5. **Roles & Responsibilities:** Collaborate with user management groups (DDC, MERL, Project) and the service leads e.g. IT, P&C to outline roles and responsibilities, organisation structure implications, resource needs
6. **Change Management:** Adoption of the system through communication materials, training sessions and ownership of responsibilities to operationalise the implementation of the NEM system.

Audience

In the first year, it is estimated that for 26,000 accounts of Digital Data Collectors (DDC) will be targeted to design for and implement this practice around prior to scaling this effort to manage other non-employees in this organization in the next 2-3 years.

Key relationships:

- User Management Groups i.e. MERL, Sponsorships
- People and Culture, IT and Procurement teams at Plan International
- Legal and Global Assurance

Project methodology

The commissioned consultant may follow the proposed methodology below. However, consultants are encouraged to submit their own methodology as part of the technical proposal.

- Internal discussion with stakeholders.
- Qualitative and quantitative data analysis through information gathering with stakeholders to input into overall requirements.

Key stakeholders:

The following stakeholders will be involved in this project:

- Project team, including IT and People & Culture, Key representatives, Global Assurance, Data Privacy Team, Partnerships, Sponsorship & Legal
- Country office representatives
- Partners and volunteers
- Senior management

4. Deliverables and Timeline

Key Deliverables

Phase 1	Activities	Deliverables	Estimated Deadline
Requirements Gathering	Inception meeting	Inception report with updated workplan	(10 days)
	Work with the non-employee user management groups to understand the needs and current practices and enabling functions for IT, Procurement, People & Culture to gather and document the requirements for a fit for purpose practice of NEMs	Draft initial report including requirements, documentation and other findings	By 24 th Jul 2023
Process mapping & design and system selection:	Collaborate with relevant stakeholders to map out the current non-employee management processes and identify areas for improvement. Incorporate findings and recommendations from the Strategic Leadership High Potential Programme NEM group. Identify the workflows required to support partners and sponsorship volunteer's lifecycle management, which is enabled through processes and technology systems. Work with IT and procurement to support selection of appropriate NEM system based on the understanding of identified business requirements for partners and sponsorship volunteers.	Draft report and internal socialisation of findings, recommendations workflows and recommended system requirements.	(20 days) By 14 th August 2023
Policy & procedure development	Collaborate with P&C, Legal and Global Assurance to develop and update policies and procedures related to management of Non-Employees taking into consideration any relevant local laws and regulations.	Updated policies and procedures progress draft report	
Data management	Work with stakeholders (P&C, IT, Data Privacy team) to identify data requirements and ensure these are in line with Plan's Global Data Privacy policy and local laws.	Data management requirements document	
Roles & Responsibilities	Collaborate with user management groups (DDC, MERL, Project) and the service leads e.g. IT, P&C to outline roles and responsibilities, organisation structure implications, resource needs	Roles and Responsibilities mapping document	
Change Management	Document recommendations for adoption of the system through communication materials, training sessions and ownership of responsibilities to operationalise the implementation of the NEM system.	High level change impact report	
Final Report & Documentation		1.Final report outlining the consolidation of previous stages of work including:	(5 days) By 21 st August 2023

		<ul style="list-style-type: none"> • Establishing and enforcing non-employee management processes. This included procedures for on-boarding non-employees, inputting end-dates in the system, periodically reviewing access for appropriateness, assigning owners to manage non-employees across the business departments and be informed about the processes. • Developing non-employee workflows. that require managers / sponsors to complete various steps, and receive required approvals, prior to the non-employee receiving access to the enterprise environment. • Establishing non-employee accountability frameworks, either for third-parties or those non-employees who have a direct relationship with Plan International. • Define the role of for non-employee management in delivering Plan International's Global Strategy including risks and opportunities • Documented policies, standards, processes for non-employee groups throughout the lifecycle e.g. on-boarding, inputting end-dates in the system, periodically reviewing access for appropriateness, assigning owners to manage non-employees across the business departments and appropriate pre-requisite training and tracking, etc • Development of non-employee accountability frameworks, outline of roles and responsibilities, organisation structure implications, resource needs for user management groups and enabling functions i.e. P&C, IT and Procurement, etc. • Input into recommendations for NEM system for management of non-employee data, process and decision making 	
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		<ul style="list-style-type: none"> • Change impact report including recommendations for implementation, communications, training materials and risk mitigation <p>2. Submit all relevant documentation, data and material supporting the above Deliverables</p>	
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Note: In the event that there is a change or additional deliverables during the contract period, an addendum to the contract must be agreed and signed. The change/additional deliverables must be in line with the initial scope of the project.

5. RFQ Timeline

Activity	Deadline
Consultancy RFQ launch	6 th June
Interested bidders submit questions or request for clarification	13 th June
Plan consolidate and answer bidder's questions	15 th June
Deadline for submission of proposals	20 th June
Interviews	Between 23 rd and 27 th June
Contract award	30 th June
Work starts	3 rd July 2023

6. Expected qualifications of consultant

- Experience of design and documenting end to end process and roles / responsibilities related to employees / nonemployees life cycle management
- Experience of providing business requirement for a global system for employee / non-employee data management
- Experience of working with diverse group of stakeholders in understanding business process and resource requirements
- Outstanding documentation, communication, and presentation skills
- Fluid in English (essential) and other languages (desirable but not essential)

7. List of documents to be submitted with the RFQ

Interested parties should submit the following documents in response to this RFQ:

Document	Must include:
Technical Proposal (pdf)	<ul style="list-style-type: none"> • Contact details (if registered as a business, please include registered name and address)

	<ul style="list-style-type: none"> • Consultant(s) CV outlining relevant experience, skills and qualifications • Relevant examples of previous work • Contact details of 2 professional references (indicate contract dates and contact's name, phone and email address) • Proposed methodology • Proposed timeline including number of days and resources required per each activity and Deliverable • Gender responsive procurement information (<i>see selection criteria below for more information</i>)
Financial Proposal (pdf, word, or excel)	<ul style="list-style-type: none"> • Detailed budget broken down into daily fees and number of resources/days required per each activity and Deliverable • Any other additional costs • Budget should be submitted in GBP. If the consultant is based outside the UK budget must be in the invoicing currency and in Euro
Signed Non-Staff Code of Conduct	<ul style="list-style-type: none"> • All consultants/applicant are required to agree and adhere to Plan International's Non-Staff Code of Conduct (Annex)

8. Submission of offers

Please send your application to Plan International's procurement team at procurement@plan-international.org referencing **"FY23 169 – Business and Organisation Design Requirements for Non-Employee Management Practice"** in the subject line and including support documents as outlined.

Deadline for submission of offers/proposals: 23:59 (BST) 20th June 2023.

9. Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at Plan's discretion.

Plan International, at its sole discretion, will select the successful RFQ.

Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Request for Quotations

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the supplier.

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

Plan International may award multiple contracts and all contracts will be non-exclusive.

10. Selection Criteria

Evaluation	Criteria	Scoring Weight
Technical Proposal	<i>Specific Experience of the Consultant(s) relevant to the assignment.</i>	20%
	<i>Adequacy of the proposed methodology to the ToR</i>	35%
	<i>Consultant(s) qualification & Competence</i>	20%
Gender Responsive Procurement	<p><i>Bidders will be allocated 5% of the overall score if they meet one or more of the following:</i></p> <ul style="list-style-type: none"> ▪ <i>If headed up by a woman</i> ▪ <i>If supplier is a women-owned business: A legal entity in any field that is more than 51% owned, managed, and controlled by one or more women.</i> ▪ <i>If the % of women in management positions is over 35%</i> ▪ <i>If % of women workers is 55% or above</i> ▪ <i>If robust gender equality initiatives are in place and active. E.g. WEPs signed, gender equality procurement policy, any additional gender-sensitive program implemented.</i> 	5%
Financial Proposal	<ul style="list-style-type: none"> • <i>Fixed pricing</i> • <i>Economically advantageous for the organisation</i> 	20%

11. Contract & Payment terms

Please note that, if successful, Plan International's standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

12. IR35 Requirements – Only applicable for UK based or connections to the UK Consultants

As of April 2021, all Global Hub UK-based contractors (Consultant/personal service company/agency/intermediary) employing "people" in their chain to deliver serves to Plan International must follow a strict process of IR35 determination.

Plan Limited will conduct a CES tool on all relevant shortlisted proposers as outlined above to determine whether they fall inside or outside IR35.

13. Plan International's Ethical & Environmental Statement

The supplier should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation. (If applicable)

14. Clarifications

The onus is on the invited individual/companies to ensure that its offer is complete and meets Plan International's requirements. Failure to comply may lead to the offer being rejected. Please therefore ensure that you read this document carefully and answer fully all questions asked.

If you have any queries in relation to your submission, or to any requirements of this RFQ, please email: procurement@plan-international.org

Thank you for your proposal