

## Terms of Reference – HCSA Information Management Systems (IFM) Consultancy

### I. High Carbon Stock Approach (HCSA) Background

The [High Carbon Stock Approach](#) Steering Group (HCSA SG) is a membership-based, multi-stakeholder initiative with a mission to end commodity-driven tropical deforestation by providing land managers with practical, credible, and inclusive tools for land use planning. The HCSA SG and the application of the [HCSA Toolkit](#) are supported by the [HCSA Secretariat](#) which is an internationally based team with its main office in Kuala Lumpur, Malaysia.

HCSA manages a lot of information and data related to its HCSA assessments, membership and associated requirements and donor relationships. There is an opportunity for HCSA to manage its information and data objectives more efficiently to allow for better information collation, analytics and reporting to inform decision making and communicate its impacts.

### II. Objective

HCSA is seeking to develop an information management strategy and system to effectively meet HCSA's future needs and ambitions outlined in its [2021-2025 Strategic Business Plan](#). The strategy and corresponding information management system will allow HCSA to optimise the use information and data for donor and membership relationship management, tracking implementation and impacts of HCSA [member requirements](#), and [HCSA assessments](#).

### III. Consultancy Remit

We are seeking the expertise of a consultant to support HCSA's Secretariat and to develop and design and information management strategy and system to suit its current and future information and data management needs.

The consultant will conduct the following tasks:

- 1) **HCSA Information Management Assessment & Gap Analysis** will be conducted to assess HCSA's current information and data management objectives and systems to identify gaps and opportunities for HCSA to optimise its information and data management aligned with its strategic and growth goals.
  - Seek a clear overview of HCSA's current and future information management goals through interviews with relevant HCSA Secretariat staff members.
  - Review current information management system and a sample of how documents and information is stored, managed and reported upon related to – i) donor and [membership](#) relationship management; ii) HCSA registration, processing and publishing of [HCSA assessments](#) and iii) HCSA membership information and data related to HCSA's [membership requirements](#).
- 2) **HCSA Information Management System (IMS) Strategy** - Based on the above two tasks identify the gaps and opportunities for HCSA to improve its information management system,

including proposals for adopting a suitable new IMS e.g., Salesforce, and develop a strategy and IMS implementation plan in conjunction with HCSA Secretariat key staff.

- 3) **Support for IMS Implementation Plan** – Provide the technical support, including tailoring the IMS to HCSA’s information management needs, for HCSA to improve and/or implement a new information management system/data platform. The support will include providing assistance with the HCSA in its roll out of the IMS including mentoring and/or training sessions with relevant HCSA staff. It is anticipated IT implementation support will need to be managed within three phases to tailor the IMS to best supporting and achieving HCSA’s IMF objectives linked to 1) donor and membership relationship management, 2) HCSA assessments and 3) HCSA membership requirements.

#### IV. Deliverables & Timeline

Output	Timeline
HCSA Information Management Assessment & Gap Analysis	November 2021
HCSA Information Management System Strategy & Implementation Plan	December 2021
Phase I (Donor/Customer Relationship) Information Management System	February 2021
Phase II (HCSA Membership) Information Management System Operationalised	March 2022
Phase III (HCSA Assessment) Information Management System Operationalised	May 2022
On-going technical support as needed.	May - Feb 2023

#### V. Budget<sup>1</sup>

- Commensurate with experience and expected deliverables.

#### VI. Qualifications and skills

- At least 8+ or more years of experience supporting and servicing clients on information management system/data platform strategies and needs.
- Expertise in designing and tailoring IMS for a variety of data and information needs from customer relations to scientific data sets.
- Strong analytical, conceptual, and problem-solving abilities
- Proven track record of excellent project and time management skills.
- Fluency in English is a requirement.
- Does not have a conflict of interest (independent/not part of HCSA SG).

Please submit tender submissions to HCSA Secretariat at [info@highcarbonstock.org](mailto:info@highcarbonstock.org) by the deadline of 20<sup>th</sup> October 2021.

<sup>1</sup> Subject to the final approval of funding.