

## **Call for tender for Technical Expert for the project “EEB new project- and finance management tools 2020-2021”.**

*The European Environmental Bureau (EEB) is Europe's largest network of environmental citizens' organisations. We bring together over 160 civil society organisations from more than 35 European countries. We stand for sustainable development, environmental justice & participatory democracy.*

The scope of this tender is to coordinate specific aspects of the project “EEB new project- and finance management tools 2020-2021”. The EEB offices are situated on rue des deux Eglises 14-16, 1000 Brussels.

The purpose of this invitation to tender is to award a contract to a Technical Expert for the following:

- Coordinate specific aspects of the planning and implementation of the project “EEB new project- and finance management tools 2020-2021”. One dedicated Technical Expert/Single point of contact should be assigned to the project. The Technical Expert will be supported by an internal EEB task force.
- The Technical Expert is expected to:
  1. Interview all relevant EEB staff and partners and produce a detailed needs analysis;
  2. Develop a detailed brief, contacting and comparing quotes from potential software solution companies in line with the EEB's procurement rules;
  3. Advise on the choice of software solution(s) and lead on the technical aspects of the contract negotiations with the selected companies;
  4. Develop an implementation strategy, including recommendations on lean procedures, a timeline for staff trainings (to be organized by the software companies) and sufficient time to test the new systems for bugs and adjusting accordingly;
  5. Advice during the final adaption and implementation phase;
  6. Support the coordination and planning of deliverables as well as budget management together with the internal EEB task force. Take care of administrative and legal procedures, coordination and receipt of works.

**Date of publication of tender:** Monday 8 June 2020

**Deadline:** Monday 6 July 2020 at 18.00 CET

Please submit tenders in English to Emma Ernsth, EEB Membership and Development Manager at [emma.ernsth@eeb.org](mailto:emma.ernsth@eeb.org)

The duration of the mission covers the first two bullet points of Phase 2 as well as the first bullet point of Phase 3 and 4 as described in the concept note below. The Technical Expert is not expected to lead on the actual staff trainings him/herself.

The offer should include a global, preliminary plan and budget for project management etc. as described above. The maximum budget available is EUR 40.000 incl. VAT.

- **Please organize your budget presentation so that it clearly corresponds to points 1-6 in the list above with details about the total price for each point.**

- The budget should clearly state the total price exclusive of tax and the corresponding tax separately.
- Please provide us with information about your environmental and/or sustainability policy. This is an integral part of our selection criteria, together with price-quality ratio and the extent to which the bid corresponds to the concept note.

The Technical Expert is expected to spend part of the time working from the EEB offices and attend frequent meetings on the EEB premises. The consultant must be independent and able to offer services free from potential conflict of interest with software companies. Please include the CV(s) of the main people involved.

Expected qualifications include (non-exhaustive list):

- Experience of leading on similar projects, ideally for international or European organisations and/or networks;
- Familiarity with different types of software solutions in the field of finance (bookkeeping, invoicing, budget- and cashflow management, timesheets, events and travel reimbursement management etc.) and project management (contract/project tracking, monitoring of deliverables and tasks/to dos, monitoring of reporting/calendar etc.).
- Fluent in English and ideally proficient in French.

Those applicants whose tenders are shortlisted will be contacted in July 2020 with meetings and interviews taking place in July 2020. We may in the meantime contact you for further information. We will expect to sign a contract in July 2020 and start the collaboration in September 2020.

*Disclaimer: Submitted documents will not be returned. The EEB will inform all bidders about the EEB's decision in relation to their bid. Bidders may ask for feedback on their bid. However, the EEB's decision will be considered as final, full details will not necessarily be disclosed and there is no possibility of appeal.*

*International non-profit association - Association internationale sans but lucratif (AISBL)  
EC register for interest representatives: Identification number 06798511314-27*

## Concept note

### Introduction

The EEB is the largest network of environmental citizens' organisations in Europe. Our 160 member organisations are based in more than 35 countries (all EU Member States plus some accession and neighbouring countries) and include a growing number of European networks. Together, they represent some 30 million people that care about nature and the environment in Europe.

At our Annual General Meeting (AGM) in Berlin 19-20 November 2019, we adopted our [Long-Term Strategy \(LTS\) for 2020-2030](#). The adopted strategy is the result of an extensive consultation exercise involving EEB working groups, the Executive Committee (ExCom), Board and full membership as well as the EEB staff.

While developing this strategy we practiced adaptive management using Theories of Change as defined by the [CMP Open Standards for the Practice of Conservation](#). External support in the strategy process was provided by FOS Europe supported by the MAVA Foundation.

The contents of the strategy represent a truly joint effort and many hours of hard work by everyone involved. We are committed to honour the work that has produced the strategy by using its contents, including agreed prioritization criteria for policy work and fundraising, to inform decision-making in working groups, staff meetings and AGMs over the coming decade. We intend to continue the participatory approach to developing strategy by reflecting on and reviewing the LTS throughout its lifetime. A mid-term review of the strategy will be conducted after five years.

While the LTS has provided the EEB membership and staff with a valuable framework and strategic direction for the organisation, it has also exposed some organisational development challenges that we need to address. To get the LTS off to a good start and to operationalize it in a meaningful way, we are therefore launching this call for tender to identify (a) consultant(s) to lead on the project of putting in place new project- and finance-management tools for our organisation.

The EEB Brussels team comprises more than 50 staff members working under the direction of the Secretary General on policy, communications, project management, campaigning, finance and administration.

The core staff leading on the implementation of the overarching organisational development and capacity building plan for 2020-2021 will be the EEB's Coordination Unit which consists of the Secretary General, the EU Policy Director, the Global Policies and Sustainability Director, the Director of Finance, Personnel & Administration, the Communications Director and the Membership & Development Manager. Other staff (e.g. policy staff) will be engaged as necessary in specific activities.

This call for tender focuses on the identified need of putting in place new project- and finance management tools for our organisation. Internally, this project will be led by a task force consisting of the Director of Finance, Personnel & Administration, the Senior Finance Officer and the IT Officer. The task force is coordinated by the Membership and Development Manager. The project is supported by the MAVA foundation.

## **Deliverables**

- **New project- and finance management tools chosen, tested, adapted and in full use by the end of 2021 the latest**

The EEB has grown rapidly over the last couple of years and is currently managing over 80 grants (a mix of EU, government, foundation and private sector funding). The tools and routines used for project- and finance-management were put in place when the EEB was a much smaller NGO and are no longer fit for purpose. The need to move to new solutions has been underlined by staff, donors and auditors and is on top of the EEB's priorities for organisational development. When

choosing (a) new solution(s) (that could also include HR elements like timesheets), the EEB will pay extra attention to making sure that it is compatible with the methodology chosen for the LTS and helps us to monitor, evaluate and learn from the LTS process. New tools should also help monitor and increase efficiency in the field of fundraising, since it will help us to have a complete overview and the whole team to have access to up-to-date figures on project funding and allocations.

- **Implementation plan – including staff training – carried out fully by the end of 2021 the latest**

The recent growth of the staff body combined with the lack of appropriate tools has put long-standing and new colleagues under pressure. We believe that it is crucial to introduce new tools in phases – with appropriate training and time dedicated to each phase – in order not to overwhelm the staff.

### **Timeline**

#### *Phase 1: Spring 2020*

- \*Recruiting and introducing new Senior Finance Officer
- \* Setting up task force to lead on the project internally
- \* Task force to develop brief for and identifying a consultant to lead on the new project- and finance management tool implementation

#### *Phase 2: Autumn 2020*

- \*Consultant to interview all relevant EEB staff, produce detailed needs analysis, develop a detailed brief, contacting and comparing quotes from potential software solution companies.
- \*Selection of software solution
- \*First adaptive management/iteration training as part of LTS implementation

#### *Phase 3: Spring 2021*

- \*Testing and customization of software solution
- \*Adaptive management, people management and organisational development trainings for line managers and the management team

#### *Phase 4: Autumn 2021*

- \*Adaption and final implementation of software solution
- \*Adaptive management, people management and organisational development trainings for line managers and the management team continued.