Terms of Reference

Title: Consultancy to develop a membership management system for the Tanzania Forest Conservation Group

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1. Introduction

The Tanzania Forest Conservation Group (TFCG) is a national Non-Governmental Organisation. TFCG's mission is 'to reduce poverty in rural communities and to conserve the biodiversity of globally important forests in Tanzania for the benefit of the present and future generations'. Over the years, TFCG has successfully conserved thousands of hectares of high-biodiversity tropical forests and woodlands, while also improving the livelihoods of hundreds of thousands of people. Recognizing the evolving landscape of conservation funding and the need for increased community involvement, TFCG, during its 2023 strategic planning process, identified the transition to a public membership organisation as a key area for institutional strengthening. This transition will enable TFCG to build a broader, more engaged support base while enhancing its capacity to sustain conservation efforts. The consultancy outlined in this ToR will play a pivotal role in this transition by establishing a secure membership management database and online donation tool.

This is a readvertisement.

2. Objectives of the Consultancy

- To assess the current status of TFCG's membership management system and donation tools.
- To evaluate existing membership management systems (e.g., Donorbox, MemberPlanet, Neon CRM) based on their functionality, usability, integration capabilities, cost-effectiveness, and relevance to TFCG's needs.
- To design and establish a secure, scalable Membership Management System,
- To ensure data security and compliance with relevant data protection regulations.
- To train TFCG personnel to operate and maintain the Membership Management System.
- To provide recommendations on the management, potential upgrades and scalability of the system.

3. Scope of Work

The consultant will discuss with TFCG to understand the TFCG public membership structure.

The Consultant will advise TFCG on existing membership management systems (e.g., Donorbox, Member Planet, Neon CRM) based on their functionality, usability, integration capabilities, and cost-effectiveness and will then set up the system in consultation with TFCG.

The Consultant will present the pros and cons of different software options, comparing at least ten different software packages. Comparisons will include information on price, relevance to TFCG's needs, ease of use in Tanzania including potential to link with popular Tanzanian payment services (e.g. M-PESA, TIGO PESA, Airtel Money), general ease-of-use for TFCG and potential members, security.

Once the system has been selected in consultation with TFCG, the Consultant will assist TFCG to set up the system to reflect TFCG's membership structure and fees as far as registering at least ten new members in different categories. It is anticipated that TFCG will gain 1,000 members over the next 5 years. The consultant will also assist TFCG to run at least one fund raising campaign and issue one newsletter.

With prior experience in capacity building, the consultant will work closely with at least two TFCG staff to ensure that they have the skills to operate and maintain the system and have access to problem-solving support networks after the close of the consultancy.

The system will provide the following services:
- Register new members;
- store contact information and membership start/end dates;
- store payment information including membership fee information on when, how much, and when to pay again;
- issue reminders for membership renewal payments
- collect membership payments and donations through an online payment system, including payments from mobile money platforms in Tanzania (M-Pesa, TIGO-Pesa, Airtel money) and from overseas using PayPal;
- deliver membership fee reminders;
- enable one-off donations to be made linked to specific fund-raising campaigns;
- track fund-raising campaigns;
- deliver newsletters, updates, and other information to all members or specified groups;
- ensure that members' information is kept securely and confidentially; and
- include tools to analyse membership information and donation updates.

The system will be:
- Secure, including ensuring privacy and protecting payment information
- Easy to use for new and existing members
- Easy to manage by TFCG
- Include options to link with accounting systems
- Compliant with Tanzanian data protection regulations
- free, or low-cost; and
- will have follow-up help options.

There exist many 'off-the-shelf' membership management systems such as Donorbox, MemberPlanet, Neon CRM and many others[1]. It is anticipated that the Consultant will assist TFCG to select one of these systems and tailor it to TFCG's needs.

Working with TFCG staff, the consultant will pilot the system including registering at least 10 new members and collecting their membership fees through an online system. Membership fee shall be set at US$ 50 per person per year, or the TZS equivalent.

Working with TFCG staff, the consultant will pilot one fund raising campaign for Tanzania's coastal forests, collecting at least 10 separate donations through the online payment system.

4. **Deliverables**
- A fully functioning membership management and online payment system for TFCG in line with the specifications outlined in the Scope of Work.
- Analysis of the pros and cons of each system (Donorbox, MemberPlanet, Neon CRM, etc.)
- At least 10 new members registered and paying membership fees without any technical glitches;
- At least one fund raising campaign operated through the new system.

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[1] https://kindful.com/nonprofit-glossary/membership-management-software-for-nonprofits/
https://doublethedonation.com/nonprofit-membership-management-tools/
https://www.techradar.com/best/best-nonprofit-software

- At least 1 newsletter sent to members.
- A comprehensive digital manual that includes step-by-step instructions, troubleshooting tips, and guidance on maintaining and upgrading the system, tailored for TFCG staff.
- At least two members of TFCG staff trained to use and maintain the system and access follow-up technical support.
- A report describing the consultancy; outlining how the system is compliant with relevant Tanzanian legislation; and including recommendations on next steps.

5. Qualifications and experience of the consultant
The successful candidate will have the following qualifications and experience:
- Relevant professional qualifications for the establishment of a membership database and secure online payment system
- Prior experience assisting at least 5 organisations to establish and maintain membership management systems including online payment systems.
- Demonstrated experience in NGO capacity building, preferably for NGOs operating in Africa
- Familiarity with the Tanzanian legal and regulatory framework, especially around data protection is an advantage.

This consultancy is open to Tanzanian and non-Tanzanian consultants and can be implemented online from overseas without physical visits to TFCG.

6. Application method
Interested consultants are invited to submit the following:
1. A detailed proposal outlining the proposed approach to the consultancy, an elaborated description of the deliverables to be provided, the team structure, roles and responsibilities, and a work plan and timeline.
2. A portfolio or examples of past work supporting NGOs to establish online donation and membership management systems.
3. Detailed CVs for all team members highlighting relevant experience and qualifications (maximum 3 pages per person).
4. A comprehensive financial proposal
5. An availability statement.

We envisage 3 person-days set-up, 2 person-days training and 3 person-days trouble-shooting/back-stopping/upgrading security settings, over three months.

7. Timeline

The consultancy is expected to start in November 2024 and be completed by January 2025. Key milestones include:

- Week 1: Initial consultations and needs assessment.
- Week 2-3: Presentation and selection of software options.
- Week 4: System setup and initial member registration.
- Week 5-6: Staff training and pilot phase.
- Week 7: Fundraising campaign and newsletter distribution.
- Week 8: Final adjustments and system handover.
- Week 9: Final presentation and reporting.

8. Submission of Proposals
Proposals should be submitted electronically to applications@tfcg.or.tz indicating 'TFCG – Membership Management System' in the subject line and addressed to the Executive Director of the Tanzania Forest

Conservation Group. The closing time for receipt of applications is 22nd October 2024 at 17:00 local time in Tanzania.

9. Evaluation Criteria

Proposals will be evaluated based on the following criteria:
1. Relevance and quality of past work (30%).
2. Understanding of the NGO sector and NGO membership management (20%).
3. Proposed methodology and approach (20%).
4. Qualifications and experience of the consultant (20%).
5. Financial proposal and value for money (10%).