Background
Pan African Climate Justice Alliance is a consortium of more than 1000 organizations from 48 African countries that brings together a diverse membership drawn from Grassroots, Community-based organizations, Faith-based Organizations, Non-Governmental organizations, Trusts, Foundations, Indigenous Communities, Farmers and Pastoralist Groups with a shared vision to advance a people-centered, right-based, just and inclusive approach to address climate and environmental challenges facing humanity and the planet.

AACJ consortium aims at building a strong African movement, led by the groups most affected by climate change i.e., women, African youth, local and indigenous communities to help to ensure that people who are most impacted and have most at stake are at the frontline of designing, developing, implementing and monitoring climate action.

The AACJ is a programme with multiple players whose contribution is critical for the success of the programme. Currently, implementing a variety of Projects that traverse direct programming, policy and advocacy, sub-granting and capacity building, mainly focusing on the most vulnerable groups which are “unreachable” in traditional development paradigms. Given its complexity it was envisioned in the programme design that an online portal will be developed to streamline granting under this programme. This portal was developed and a system test was done through the call for applications in Cohort 1. In that implementation we had a few challenges and lessons learnt on what did not work well, from which, there is need for the system improvement for better output, performance and all users’ satisfaction.

As a requirement, the portal should be flexible and upgradable depending on the number of projects available. The portal therefore, will have a template with the capabilities of adding new projects as they emerge. This project will only act as a guide for adding new projects’ grants into the portal. Whereas other elements of this programme can be streamlined through this portal, the sections below focus on the granting under the resource facility as envisioned under this project.

It is with this background that PACJA is seeking to engage a suitably qualified Expert to provide technical support on the proposed amendments and improvement of the said Small Grants Management System, dubbed SGMS, as per objectives of the functionalities below:

Overall Objectives
The objective of this project is to develop a comprehensive Grants Management System that enables PACJA to efficiently manage grants for climate-related projects in Africa. The system should enhance transparency, streamline processes, and facilitate effective monitoring and evaluation.

- Familiarize with the existing System Code to better understand how the system is set.
- Improve the Existing code to better meet all the requirement
- Enable SSL certificates on the system and test security issues
• Provide a support during and after the following Cohort’s applications.
• Make a brief User Manual for future reference, as well as a training to the ICT.
• Enable auto backups

Scope of Work:
The scope of work for the development of PACJA's Grants Management System includes, but is not limited to, the following:

a) Requirements Analysis:
   • Conduct an in-depth analysis of PACJA's grant management processes, considering stakeholder inputs and organizational needs.
   • Identify and document the functional and technical requirements for the Grants Management System.

b) System Design and Architecture:
   • Develop a comprehensive system design document that outlines the overall architecture, data flow, and user interface of the Grants Management System.
   • Ensure the system design aligns with best practices in user experience, data security, and scalability.

c) System Development and Testing:
   • Develop the Grants Management System according to the agreed-upon requirements and design specifications.
   • Rigorously test the system to ensure functionality, security, and reliability.
   • Conduct user acceptance testing with PACJA staff and stakeholders to validate system performance.

d) User Documentation and Training:
   • Create user manuals and training materials to guide PACJA staff, reviewers, approvers, and applicants on system usage and best practices.
   • Conduct training sessions or workshops to familiarize users with the Grants Management System.

e) System Deployment and Support:
   • Ensure successful deployment of the Grants Management System in a production environment.
   • Provide at least 1-year post-deployment support to address any system issues or enhancement requests.
   • Develop a maintenance plan to ensure ongoing system support and updates.

Deliverables:
The following deliverables are expected as part of the development of PACJA's Grants Management System:

a. Requirements Analysis Report:
   • Detailed report outlining the functional and technical requirements of the system based on stakeholder consultations and organizational needs.

b) System Design and Architecture:
   • Comprehensive system design document describing the overall architecture, data flow, and user interface of the Grants Management System.
c) System Development and Testing:
- Developed Grants Management System in accordance with the agreed-upon requirements and design.
- Rigorous testing to ensure system functionality, security, and reliability.

d) Evaluation and Acceptance
- User Acceptance Testing: Define the criteria and process for conducting user acceptance testing, involving key stakeholders to ensure system functionality, usability, and alignment with user requirements.
- Evaluation Criteria: Establish evaluation criteria to assess the system's compliance with the defined requirements, including performance, security, usability, and integration capabilities.
- Acceptance Criteria: Define the criteria that must be met for the system to be accepted by PACJA, ensuring alignment with the organization's objectives and specific needs.
- Handover: Plan for a smooth handover of the system to PACJA, including data migration, system deployment, and any necessary training or support during the transition.

e) User Documentation and Training:
- User manuals and training materials to guide PACJA staff, reviewers, approvers, and applicants on system usage and best practices.
- Training sessions or workshops to familiarize users with the Grants Management System.

f) System Deployment and Support:
- Successful deployment of the Grants Management System in a production environment.
- Post-deployment support to address system issues or enhancement requests.
- Demonstrated experience in developing similar systems for NGOs or grant-making organizations.
- Technical expertise and familiarity with relevant technologies and frameworks.
- Understanding of the specific requirements and challenges of PACJA's Grants Management processes.
- Proposed methodology, timeline, and budget.
- Availability of post-deployment support and maintenance services.

g) Reporting: The selected development team or vendor will provide regular progress reports to PACJA, detailing the status of the project, key milestones achieved, and any challenges or risks encountered.

h) Intellectual Property Rights: All intellectual property rights for the developed Grants Management System will be transferred to PACJA upon project completion.

i) Confidentiality: The selected development team or vendor must ensure the confidentiality and security of PACJA's data and information throughout the development process and beyond.

j) Legal Considerations: The development of PACJA's Grants Management System should adhere to all applicable laws, regulations, and data protection requirements in the relevant jurisdiction.
Overall Features

The following are detailed features and requirements for PACJA’s Grants Management System, designed to enhance efficiency, transparency, and impact in managing grants for climate-related projects: (the system is not limited to this, the developer should advise for more features)

1. User Management:
   - User Registration and Profile Management:
     - Allow applicants, reviewers, approvers, and PACJA staff to register and create user profiles within the system.
     - Capture and store relevant user information such as name, contact details, and organizational affiliation.
   - Role-Based Permissions and Access Control:
     - Implement role-based access control to ensure that users can only access and perform actions relevant to their assigned roles.
     - Administer permissions for different user types, such as applicants, reviewers, approvers, and PACJA staff, to ensure data security and confidentiality.
   - Password Reset and Account Management:
     - Provide functionality for users to reset their passwords in case of forgetfulness or security concerns.
     - Allow users to manage their account settings, such as updating contact details or changing passwords.
2. Grant Application Submission:
   • Online Application Platform:
     - Develop a user-friendly online platform for applicants to submit grant applications easily and securely.
   • Application Form:
     - Design an application form with fields to capture project details, including project description, objectives, methodologies, and expected outcomes.
     - Include sections for budget planning, timeline, and required supporting documents (e.g., project proposals, financial statements, work plans).
   • Validation Checks:
     - Implement automated validation checks to ensure the completeness and eligibility of applications.
     - Notify applicants of any missing information or inconsistencies in their submissions.
   • Secure File Upload:
     - Provide a secure file upload functionality that allows applicants to attach relevant supporting documents to their grant applications.

3. Review and Evaluation:
   • Reviewer Assignment:
     - Develop a mechanism to assign qualified reviewers based on their expertise and availability.
   • Online Review Interface:
     - Create an intuitive online interface for reviewers to access and review grant applications.
     - Include scoring mechanisms, comment sections, and rating systems to facilitate fair and transparent evaluations.
   • Workflow Management:
     - Implement a workflow management system to track the progress of applications through the review process, ensuring timely completion of reviews.
   • Aggregation and Compilation:
     - Aggregate scores and comments from multiple reviewers for each application to provide a comprehensive evaluation summary.

4. Approval and Agreement:
   • Approval Workflow:
     - Design a workflow for approvers to review and provide decisions on grant applications.
     - Allow approvers to approve, reject, or request revisions to applications based on established criteria.
   • Automated Notifications:
     - Implement automated notifications to approvers, notifying them of pending applications requiring their review.
     - Send notifications to applicants regarding the status of their applications (e.g., approval, rejection, pending review).
   • Grant Agreement Generation:
5. Monitoring and Reporting:
   - Project Progress Tracking:
     - Enable PACJA and project managers to track the progress, financial management, and impact of funded projects.
     - Capture project milestones, deliverables, expenditures, and outcomes to monitor project implementation.
   - Customizable Reports and Dashboards:
     - Provide customizable reports and dashboards that present project data, grant utilization, and performance indicators in a clear and meaningful way.
     - Allow stakeholders to generate reports based on selected parameters (e.g., project status, grant type, geographical location).

6. Communication and Notifications:
   - Email Notifications:
     - Set up email notifications to inform applicants of key stages in the application process, such as submission confirmation, review updates, and final decisions.
   - Internal Messaging System:
     - Implement an internal messaging system that enables effective communication between PACJA staff, reviewers, approvers, and applicants.
     - Enable users to send and receive messages, share attachments, and maintain a history of communication related to each grant application.

7. Financial Management:
   - Budget Tracking and Financial Reporting:
     - Develop functionalities to track budget allocations, expenditures, and financial reporting for funded projects.
     - Integrate with accounting systems or provide export options for financial data analysis.
   - Support for Multi-Year Grants and Budget Revisions:
     - Allow for the management of multi-year grants, including budget revisions and adjustments as necessary.

8. Integration and Scalability:
   - Integration Capabilities:
     - Consider future integration with other systems, such as finance or project management tools, to streamline data exchange and enhance efficiency e.g., Navision ERP.
   - Scalability:
- Ensure the system is scalable to handle an increasing number of grants, users, and data volume without compromising performance.
  - Multiple Languages and Currencies:
    - Support multiple languages and currencies to accommodate applicants and projects from different regions in Africa.

9. Data Security and Privacy:
   - Data Encryption and Secure Storage:
     - Implement encryption techniques to secure sensitive data, both during transit and storage.
     - Store data on secure servers with appropriate access controls and security measures.
   - Compliance with Data Protection Regulations:
     - Ensure compliance with relevant data protection regulations (e.g., GDPR, local data protection laws) to protect the privacy of user and applicant data.
     - Role-Based Access Control and Audit Logs:
       - Implement role-based access control mechanisms to restrict data access based on user roles and permissions.
       - Maintain audit logs to track system usage and monitor any unauthorized access attempts.
   - Regular Data Backups:
     - Establish a regular data backup system to prevent data loss and ensure system reliability in case of emergencies or technical issues.

10. User Experience:
   - Intuitive and User-Friendly Interface:
     - Design a user interface that is intuitive, visually appealing, and easy to navigate for all system users.
   - Responsive Design:
     - Ensure the system is responsive and accessible across various devices (desktop, mobile, tablet) to accommodate different user preferences.
   - Help Documentation and Tooltips:
     - Provide comprehensive help documentation and tooltips to guide users through the system's functionalities and processes.

11. Landing Pages and About the Grants:
   - It should have a landing page with capabilities to add sliders & About Us page and with capabilities to add additional pages.
Hosting

i. The platform shall be hosted on the PACJA server as a Sub-domain: gms.pacja.org

ii. PACJA has absolute rights and other members of the consortia are assigned rights as specified below and for purposes necessary to achieve the objectives of AACJ project and any other project of PACJA that require implementation through sub-granting

Time Frame

The system is a matter of urgency. The improvements are expected to take place within 2 months.
Annexes

This annex provides supplementary or additional information to support the main content of a document. It typically includes materials that are relevant but too extensive or detailed to be included in the main body of the text.

Key functionalities/ Capabilities expected from initial TORS

This platform shall have the following functionalities

1. Broadcasting capabilities on grants that are open to all Coalition members and all the members of country platform.
2. Provide a structured space for persons and institutions to access useful information on specific grants of interest and to pursue queries of interest on specific grants.
3. Provide for options out of structured online platform for applicants who are keen to leave less digital footprint due to the nature of the tasks that they are pursuing.
4. Create interactive option for submitting applications, receiving acknowledgement of submission and keeping applicants on track on the status and stage at which processing of their applications is at.
5. Provide a platform for collective action and accountability for the project, being able to track grant requests per country, action in processing grants at Country Platform Levels, Consortia members and support from PACJA.
6. Host reports on partner assessments done at Country Platform, Consortia members levels in regard to identified capacity gaps for mutual and harmonized capacity building plan by members.
7. Broadcast other major events of significant relevance to PACJA members.
8. A reserve bank for proposals requiring funding where noble proposals not funded due to shortage of funding or that require further refining can be deposited.

1. Main Tab Sections
   (In every added project, the portal must have capabilities of adding such sections/tab)
   i. Home which gives an overview the projects
   ii. The different types of sub-grants in this grant for example in AACJ, we have five different and interrelated sub-grants, all accessible through the online portal
      CJRFA-1: Movement building fund
      CJRFA-2: Alliance building fund
      CJRFA-3: Human rights fund
      CJRFA-4: Litigation Fund
      CJRFA-5: Local Action fund
   iii. **How to apply** (Each grant must have an “apply” button)- One should be able to upload some documents, get auto response indicated whether the application was completed and should be able to disable applications after the deadlines.
   iv. **Frequently asked questions** and contacts for each grant type.
v. Feedbacks Tab

2. The portal will function as a monitoring tool and tracking the progress of each grant proposal (e.g. incomplete, applied, approved, rejected etc). One should be able to extract the list of applications

After rolling out the Small Grants Management System in Cohort 1, the following are some of the key notes on our lessons learnt

Additional Notes on Small Grant System (adjustments on the system)

A. Observations on grant applicants:
   i. Provide for users to have self-activation, since their role is limited in the system and can only access the system from the point of applying for grants. It will to ensure some users are not locked out due to delays in activation
   ii. Improve on out reply as follows:
       a. The first out reply immediately on submitting applications shall read as follows “Thank you for expressing interest in this call for grant proposal. Your proposal has been successfully filed in our system”
       b. The second auto reply immediately after review at country level and after being forwarded to PACJA secretariat shall read “This is to notify you that preliminary assessments have been conducted on your proposal and your application has been forwarded to PACJA secretariat for in-depth review”
       c. The third auto reply shall read as follows depending on whether you are successful or not
          i. If approved: “Your proposal submission under the call for African Activists for Climate Justice is successful. You will receive communication from PACJA secretariat on next steps”
          ii. If rejected: “Thank you for expressing interest for granting from PACJA. In this round of calls, PACJA received extremely competitive proposals. Your proposal has been reviewed against the criteria set and other submissions and we regret to inform you it did not meet the required threshold. Keep on the look for our website (www.pacja.org) for other opportunities on call for proposals that will be opening soon”
   d. Applicants shall only see from the frontend of PACJA’s small grant system information on:
      i. The call for proposal
      ii. Commonly asked questions (this is a discretionary element and we shall strive to provide additional information if not captured within the proposal
      iii. Eligible countries and eligible partners
      iv. Grant application templates – Narrative proposal; Finance template
      v. Period within which grant submission should be done
   e. Provide for options to send in questions on the call for grants in any area that may not be too clear.
   f. To improve on ease of submissions for applicants and attaching the right documents in the right slots, provide for slots for different attachments
i. Proposal narrative (attach here)
ii. Budget/ financials (attach here)
iii. Registration certificate (attach here)
iv. Constitution of the organization/ bye laws (attach here)
v. Other attachments for well-established entities (attach here)

B. Country Convener’s level
i. Just for emphasis, the country conveners will not access the other parts of the system
ii. The role is limited to a preliminary assessment of grants received using a standard ‘Grants Preliminary Assessment’ tool and sharing this with PACJA secretariat. Kindly provide for this as an attachment and space for ‘Additional comments’ as necessary in the system
iii. As such, revise and omit the capacity assessment and Appraisal for proposals functions from country platforms
iv. Introduce two notifications to Country conveyors
   a. The first is to notify them of grants that are open. This shall pick on a call for proposal that is open straight away so that country conveners too can contribute in publicizing the grant availability within network members
   b. The second is to notify them of grants awarded. Once grant has been awarded an auto-generated message should be send to Country Convener.

C. PACJA Secretariat:
i. Assign different rights to staff as they play different roles in the system
   a. View Only Rights – Staff can access the system, see what is in the system and cannot change what is already in the system. They can however usefully extract the information in the system without change
   b. Administrator Rights – assigned to ICT for purposes of subsequent adjustments to the system as may be necessary
   c. Grants administration rights – this is the team who upload, review what is uploaded in the system, activate grants status, access proposals received and review and file relevant reports (capacity assessments and assessment reports for submission) among other operational elements, including correcting errors. This team cannot however access the system to correct information on proposals already awarded
   d. Approval and Award Rights: Assigned to Senior Management

ii. For purposes of control – staff applying for a role in the system at PACJA secretariat level will have to be activated by the administrator and assigned rights as appropriate and as guided above.

iii. After information on a call for proposal has been entered in the system and verified, provide for an option of locking the system for safety and data stability. Whatever has been entered in the system by the Backend users should be reviewed by the ‘Approval and Award’ rights groups and once signed off becomes secure data. This can be done by providing options for ‘Sign Off’ as appropriate. For instance, after information on a proposal and a call has been
keyed in and verified, it should be signed off. Similarly, after an approval and award, a sign off should be done to lock all information in that state without alterations.

iv. The review for proposal received and the approval process happens at PACJA’s level. create for options to transfer the Capacity Assessment Reports/ Proposal Scoring sheets to PACJA secretariat

v. Change the tab reading ‘Coalition member’ to ‘PACJA Member’, and also include the Non-Members of PACJA’.

vi. Add a ‘Reject’ tab after the ‘Put-on-hold’ tab. Add a text box for summary substantive reasons that informs either rejection or putting on hold of an application. These comments are meant for internal reviewers and internal use and not part of the auto-reply messaging. The reasons could be used in framing diplomatic responses to an applicant who is seeking substantive and specified reasons on rejection of their application.

vii. The system to include the granting limit, in this case maximum amount available for a single applicant under a particular category of grant. Design the system to reject any granting above the maximum allocated grant per applicant.

viii. The backend processes should be designed with cut-off dates for submission of proposals and the system should not allow for submission of proposals past the call off dates, time. In this case the section for call for proposal, and in absence of a new call for proposal shall read: “We are glad you expressed interest to join the cause for a just Africa through the Africa Activist for Climate Justice call, in case you missed the timelines for this submission keep on look for new opportunities”

ix. In case of two calls for proposals happening at the same time, design the system to be able to publicize both in alternate manner.

x. Make it opaque in a way that when 2 different applicants can see each other’s details (when they have selected the same Organization)

xi. Kindly, also can you make it possible so that the system can be able to separate the first applications from the next cohorts?

xii. Enable auto clearing of Cache (Some applicants are unable to login after signing up unless they clear the browser’s cache manually)

xiii. Enable the search button in Applications (Enable filters/Sorting)

D. Reports and Analytic Capabilities
Continue to improve on this section of the report to provide for:

i. Introduce a section that captures grant liquidation under each specific stream of grants. This should capture total grant size; total grant disbursed to date; total grants disbursed in each year; total grants committed (awarded but not disbursed) and total grants liquidated (grants accounted) for to date.
ii. Add a text/comment box where the grants administrator can give quick quarterly updates – Narrative feedback on grant performance

iii. Dashboards should also be provided for in the system, this provides for quick and simple presentation of performance, and quick updates to management for decision making

iv. Analytics should allow for extraction of data from the system for any additional data analysis

v. Integrate the granting system with the Organizational M&E system