



## **TERMS OF REFERENCE**

### **Improving the data management platform (Salesforce) for the IUCN Green List of Protected and Conserved Areas**

#### **Projects:**

1. Trilateral Cooperation (Germany, China, Zambia, Namibia): Fair and effective protected area management for sustainable development – working together towards global standards
2. IUCN Tech for Nature: using communications and technology to help achieve fair and effective protected areas through the IUCN Green List Sustainability Standard and evaluation process
3. Protected Area Solutions for Biodiversity and Climate Change

#### **A. Background information**

The **IUCN Green List Protected and Conserved Areas** is a programme of certification for protected and conserved areas (PCAs) that are effectively managed and fairly governed. It acts as incentive and offers a stepwise programme that can help make PCAs fit for the future and thus secure past successes and future investments. To date, 60 protected and conserved areas are 'Green Listed' and more than 600 candidate sites are registered in 60 countries across all continents. By 2030, the objective is to engage 50% of the world's protected and conserved areas (by area) in at least 50% of the world's countries. Such an ambition requires a robust data management system to process and streamline all data related to sites, experts and countries involved in the Green List.

The **Community of Protected Areas Sustainability Standard (COMPASS)** is the central knowledge management system and standard integration platform for the entire Green List community. This platform is a cloud-based database powered by Salesforce and includes collaboration tools. COMPASS has multiple uses: enabling efficiency of the Green List process, storing data and evidence collected during the Green List process in a secure repository, providing a dedicated communication platform for the Green List community, and compiling network-wide data to measure progress towards global goals. The goal is also to integrate online training to help achieve the Standard.

The main users of COMPASS are:

- The site managers and staff responsible for ensuring compliance with the Green List standard, who make self-assessment data available online
- The Mentors in charge of advising the site managers on the Green List process and supporting them in collating evidence for the purpose of Green Listing
- The Expert Assessment Groups for the Green List (EAGL) which evaluate sites for compliance with the Standard
- The Reviewers ensure that the rules and procedures of this User Manual are consistently applied in the Green List process.

To support the expansion of sites and experts, significant development of the tool is recommended. As the Green List network continues to grow, the COMPASS tool should develop into a place where community members can independently perform the actions of the Green List process, including assessment, ongoing monitoring and trainings. Attention should



be therefore paid to the needs of the different users of COMPASS and build the capacity to complete the entire Green-Listing process from beginning to end within the tool. It is important to consider continuous enhancements based on user feedback. It's also really critical that COMPASS enables easy and continuous monitoring of performance management through dashboard systems. An easy-to-use system is essential, which relies on automation where appropriate. Having a community connection and an online training platform will also be a unique value proposition for the Green List, encouraging more protected and conserved areas to engage in the process.

For this purpose, IUCN is looking for support from a consultant who will work closely with a project-manager based within IUCN's Protected and Conserved Areas Team. The consultant will be in charge of revamping the COMPASS platform and developing new features using built-in Salesforce tools, and the collaboration will involve consultation on an as-needed basis; including, but not limited to, providing additional technical expertise to IUCN staff, implementing ad-hoc requests, and answering questions which arise.

## **B. Objectives**

The main objective of the consultancy is to make COMPASS an easy-to-use knowledge, communication and training hub for the Green List stakeholders.

The specific objectives are:

- a. To help all users manage and share relevant data,
- b. To facilitate collaboration among stakeholders,
- c. To report progress towards global goals, and
- d. To provide access to online training.

For participating protected and conserved areas, the ambition is

- e. To optimize process from a user perspective,
- f. To become more efficient and cost-effective, and
- g. To develop advanced data management systems that track progress and impacts over time.

## **C. Geographical Focus**

The IUCN Green List of Protected and Conserved Areas is a global Standard and this work should be done towards global application.

## **D. Activities**

The consultant would perform the following technical tasks (including but not limited to these only):

- a. Work closely with IUCN staff to design and implement solutions to meet needs. Perform design, configuration, testing, and deployment activities (including engaging with Salesforce directly on behalf of IUCN, if needed).
- b. Connect Salesforce to other interfaces as needed (for example, to websites via API).
- c. Migrate data between existing objects and newly created objects.
- d. Brainstorm with IUCN staff for new and innovative ways to use Salesforce to advance the mission of the IUCN Green List.

Based on the above objectives, we require the following deliverables:



### **1. Enhance COMPASS interface for the Green List workflow (60%)**

- Provide recommendations for COMPASS improvement
  - Gather and review the recommendations already addressed by the Green List Community
  - Agree on objectives and action plan
  - Set up focus groups with COMPASS users (EAGL members, site managers, reviewers, mentors) to understand user perspective and needs on Green List journey, and to test new interface
- Tailor interface and information to the user groups, to better reflect the workflow of the process
  - Review data flow and relevancy of the fields making them optional or mandatory according to site and expert specificities
  - Simplify the site evaluation process by integrating the “Green List Pathway” (this activity will be linked to another consultancy)
  - Consider the site “re-listing” process (5-year renewal) within COMPASS including an up to date mechanism of the data
  - Examine the notifications and automation in COMPASS to ensure they enhance the usability of the platform and contain the most up-to-date information
  - Improve collaborative functionalities based on Salesforce (Chatter function) for sites and EAGLs to share information.

### **2. Enhance automated reporting functions to track progress at the site and global level (20%)**

- At site level
  - Develop an interface to measure site performance and track change of each criterion over time, based on IBEX scoring system (Improvement Benchmarking and Evaluation Index)
  - Set up the dashboard feature to display site evaluation data (milestones achieved) and interactive graphs (bar charts, pie charts, etc.).
- At jurisdictional level (countries and regions)
  - Set up dashboards and automated reports to monitor the implementation of the Green List globally and in the regions
  - Develop a quiz/short survey function for user consultations
  - Integrate an automatically updated map of sites and country commitments.

### **3. Ensure database interoperability (20%)**

- Develop database information sharing protocols (APIs) with PANORAMA Solutions, WDPA and the Green List website (data on sites)
- Work closely with other consultancy on spatial data integration and Green List App development.

## **E. Timeframe**

The Assignment is spread within a period of six (6) months from the date of commencement, with an estimated total of 50 working days. The Consultant will provide a detailed time schedule for the task and cost for the delivery of the outputs. The schedule will be agreed upon by the two parties (Consultant and IUCN) during the presentation of the inception report.



## **F. Required experience and qualifications**

The successful Consultant is required to meet the following criteria:

### Education

- Good academic profile (Degree in a relevant subject; MSc level preferred, but not essential provided the candidate has strong relevant skills and experience)

### Work Experience

- Strong work experience in Salesforce development, including familiarity with Salesforce communities.
- Salesforce Developer experience (Visualforce pages, Apex code)
- Passionate about Salesforce Products, with a solution-finding attitude.
- Excellent technical communication skills - documentation, presentations and conference calls.
- Flexibility to work on an “as-needed” basis, and to be available by phone or email for consultation.
- Experience transitioning from Classic to Lightning is an advantage.
- Experience working with non-profit organizations – strongly preferred.
- Experience working with Standards and Certifications systems and/or protected and conserved areas and/or conservation impact assessment is an asset.

### Language Proficiency

- Fluency in written and spoken English
- French and/or Spanish is a plus

## **G. Application closing date and time**

The application, in a single PDF file, must include (i) a cover letter outlining clearly how the candidate meets the requirements of the position, (ii) a detailed CV and (iii) technical and financial proposal 2 pages. Consultants must submit their applications no later than Midnight CET time on May 20, 2022 by e-mail to: [thierry.lefebvre@iucn.org](mailto:thierry.lefebvre@iucn.org) and [Deviah.AIAMA@iucn.org](mailto:Deviah.AIAMA@iucn.org)

The subject heading of the e-mail shall be “COMPASS improvement”.