



Terms of Reference

Consultancy for Zoho-Based Digitalization and Operational Integration

1. Background

The Mesoamerican Reef Fund (MAR Fund) is a regional, private environmental fund with the objective of supporting the protection of the Mesoamerican Reef (MAR) ecoregion, shared by Mexico, Belize, Guatemala and Honduras. Its mission is to seek, secure and facilitate regional funding, foster partnerships and drive capacity building for the conservation, restoration, and sustainable use of marine and coastal ecosystems in the Mesoamerican Reef region.

The MAR Fund Board of Directors is comprised of the founding funds, the regional Central American Commission on Environment and Development (CCAD), notable conservation experts from each participating country, and international collaborators and donors.

MAR Fund is registered in the United States as a tax-exempt charitable organization. Although it is legally established outside the MAR, its purpose is to provide sustainable funding for conservation in the ecoregion. A MAR Fund chapter is registered in Guatemala City since August of 2014, where the coordinating office is established, but its staff is distributed in the four countries.

MAR Fund prioritizes projects and distributes funding. In its 20 years, it has raised US\$46.1 million in project funding US\$14.3 million in sinking funds and manages an endowment of US\$37.6 million as of December 2025. MAR Fund has provided funding to partners in the region through different channels, such as small grants and large, multiannual projects. MAR Fund grantees include community organizations, NGOs, governmental organizations, academia and individuals.

The Fund carries out its mission through five programs, as follows:

1. Saving our protected areas: a legacy of caring. Establishment and protection of an interconnected network of priority coastal and marine protected areas in the region.
2. Fishing for the future: sustainable fisheries for a thriving reef. Community participation in co-management of their fisheries, establishment of fish replenishment zones and monitoring and protection of fish spawning aggregations.
3. Climate change: the need is now. Supporting adaptation to climate change and its impacts on the reef.
4. Clean water for the Reef: improving sewage and solid waste management for a healthier ecoregion and its people.
5. Blue and regenerative economy. A crosscutting program that strengthens and supports ventures with a positive impact on coastal and marine ecosystems and resources and the communities that depend on them.

In July 2022, MAR Fund and its partners began the rollout of the MAR+Invest Initiative, supported by the Global Fund for Coral Reefs (GFCR). It is a blended finance mechanism with a strong emphasis on impact monitoring and evaluation, business acceleration, access to finance solutions and capacity building. The goal is to invest in market-based solutions that contribute positively to the health and resilience of coral reefs in the four countries of the MAR. This initiative is being implemented in alliance with the following organizations: Healthy Reefs for Healthy People (HRHP), New Ventures/VIWALA and the Mexican Fund for the Conservation of Nature (FMCN)/Sureste Sostenible. More information at <https://mar-invest.org/>

MAR Fund has also supported the establishment and operation of regional networks, such as the Connectivity Network, the Reef Restoration Network, the Sustainable Fisheries Network and the Fish Spawning Aggregations Network. It is also part of the Healthy Reefs Initiative, an international effort that measures and tracks the health of coral reefs in the region, and the MAR Leadership Program, a capacity-building initiative that strengthens leadership skills of young conservationists in the four MAR countries and scales impact through support of their strategic projects.

In 2019, MAR Fund developed a Project Management System for its Small Grant Program—an online platform used for proposal submission. In 2023 with support from the German Cooperation through KfW, a second online platform was developed for the technical and financial follow-up of Phase III projects.

MAR Fund is undergoing a digital transformation. After evaluating several digital platforms—and with the guidance and support of Costa Rica por Siempre (CRxS)—the organization has selected Zoho software as its preferred solution. MAR Fund has completed the mapping and prioritization of all internal processes and is now prepared to transition from manual procedures to a fully digital system.

More information about the MAR Fund can be found at <https://marfund.org>

2. Objective of the consultancy

To serve as the primary technical lead for the design, configuration, and deployment of a comprehensive Zoho-based digital system for MAR Fund. The IT Consultant will be responsible for the technical execution and digitalization of internal processes, working under a knowledge transfer model and receiving direct strategic mentorship and functional guidance from Costa Rica por Siempre (CRxS).

3. Scope of work

The IT Consultant will be the primary lead for technical execution and digitalization. In coordination with MAR Fund's key staff and guided by the institutional mentorship of CRxS, the consultant will advance MAR Fund's digital transformation by designing and implementing a robust Zoho-based system. A core component of this scope is the technical integration of

existing platforms—specifically the 2019 system for Small Grant Program proposals and the 2023 technical/financial project follow-up platform (Phase III).

The IT Consultant's responsibilities include:

- Analyze and understand MAR Fund procedures
- Analyzing and optimizing current workflows for digital migration.
- Configuring Zoho applications according to the functional blueprints provided during mentorship.
- Ensuring a user-friendly interface and seamless system integration.
- Supporting change management and staff training to ensure long-term adoption.

The final objective is an integrated ecosystem that enhances efficiency, promotes transparency, and enables data-driven decision-making across MAR Fund.

The prioritized processes to be digitalized are:

- I. Grantees projects follow up (Project Cycle)
 - a. Reception of proposals (except of SGP and special projects).
 - b. Link the current SGP and Phase III project platforms to Zoho.
 - c. Grant agreements, grant letter, collaboration or administration agreements elaboration and signature (for all MAR Fund programs and projects).
 - d. Project monitoring:
 - i. Reception of technical, financial and ESMS reports.
 - ii. Review and approval of reports.
 - iii. Interim follow up calls.
 - iv. Field visits (technical, financial and ESMS compliance).
 - e. Preparation and approval of requests for disbursements (implementation of Check list).
 - f. Modification requests revision and approval.
 - g. Project closing:
 - i. Closing letter.
 - ii. Termination of agreements.
 - h. Implementation of projects' final evaluation.
- II. Follow up of Consultancies:
 - a. Contract elaboration and signature.
 - b. Product revision and approval.
 - c. Payment requests.
 - d. Requests for modifications.
 - e. Closing of consultancies/ cancellation of contracts.
 - f. Consultants' database register recommended and not recommended consultants.
- III. Donor budgets implementation:
 - a. Link to expenditures from administration platform (Odoo) to show budget implementation per donor.

IV. Indicator:

- a. Compilation of information from grantee technical reports.

4. Methodology

The IT Consultant is expected to follow a participatory, phased approach, collaborating closely with MAR Fund staff and actively participating in advisory sessions with CRxS. CRxS will not be responsible for technical development, system configuration, coding, or integrations; these remain the sole responsibility of the IT Consultant.

a) Assessment and Process Understanding

- Conduct an in-depth review and understanding of MAR Fund internal processes previously mapped and prioritized and who in the team is involved in each process.
- Review and understand MAR Fund existing platforms to assess how they can be connected to Zoho.
- Lead working sessions with MAR Fund's administrative and technical directors to clarify workflows, identify pain points, and define expected improvements.
- Identify gaps or inefficiencies in current procedures that can be addressed through digitization.
- Document findings and refine process maps as necessary to guide system development.

b) Strategic Alignment and Mentorship with CRxS

- Work closely with CRxS to align on the digital transformation strategy and Zoho implementation framework.
- Participate in coordination meetings to share progress, validate key decisions, and leverage CRxS's experience in using Zoho for similar purposes.
- Ensure consistency and compatibility with existing Zoho-based solutions used by CRxS where applicable, promoting knowledge transfer and system coherence.

c) Zoho Configuration, Development and Integration

- Execute the technical setup, configuration, and customization of Zoho applications based on prioritized processes, ensuring scalability, usability, and data security.
- Perform the technical integration of existing platforms (the 2019 and 2023 systems) into the new Zoho ecosystem to ensure data continuity.
- Conduct iterative testing phases with MAR Fund stakeholders to validate system functionality and perform technical troubleshooting.

d) Training MAR Fund Key Staff

- Design and deliver tailored training sessions for staff based on their roles and responsibilities within the new system.
- Develop comprehensive user manuals and technical documentation to ensure knowledge retention and MAR Fund's long-term operational autonomy.

5. Deliverables

- i. **Detailed Work Plan and Process Validation:**
 - a. A document refining the previously mapped workflows based on the initial assessment, including a timeline for development.
 - b. A general map of institutional processes, including functional process diagrams (BPMN or flowcharts), role and responsibility diagrams (Swimlane diagrams), and process and record lifecycle diagrams.
 - c. A data model (Entity–Relationship Model), including the definition of relationships and cardinalities between modules, a review of data normalization and standardization, and the development of an institutional data dictionary.
- ii. **Fully Configured Zoho System:**
 - a. Development, configuration, and customization of the Zoho modules covering all the prioritized processes mentioned in this ToR.
 - b. Develop the functional and technical architecture of the Zoho solution, including an integration diagram between Zoho, Odoo, and existing platforms; the design of standard and customized modules; the definition of users, roles, profiles, and permissions; documentation of business rules, validations, dependencies, and design rules; and the definition of workflows, automations, Blueprints, and approval processes.
 - c. Develop a data migration strategy and testing plan, for ingestion of existing data from the Odoo platform and SGP and Phase III platforms.
- iii. **Testing and QA Log:** Documentation of iterative testing phases with MAR Fund stakeholders, including troubleshooting and adjustments made based on feedback and CRxS's technical validation.
- iv. **Training and Documentation:** Comprehensive user manuals, technical documentation, and execution of tailored training sessions for MAR Fund staff (administrators and users).

6. Supervision and coordination

- **Technical implementation:** Responsibility for implementation, day-to-day execution, and technical troubleshooting will remain entirely with the IT Consultant. MAR Fund Technical and Administrative directors will follow up the implementation of the consultancy.
- **Technical validation:** CRxS will act as a strategic mentor, providing non-binding strategic and functional feedback via periodic "Quality Assurance" (QA) sign-offs confirming that the IT Consultant's development meets established standards.
- **Final approval:** The Executive Director of MAR Fund will provide the final approval for all deliverables and project completion, based on the technical recommendations from both the Technical Director and CRxS.

- **Logistics & licensing:** MAR Fund will be responsible for providing the necessary Zoho platform licenses, including all required modules. The IT Consultant, with guidance from CRxS, will advise MAR Fund on the specific license types and modules needed to fulfill the project's technical requirements.

7. Duration

The consultancy is expected to be completed within six months, with specific deadlines for key deliverables to be agreed upon at the start of the project.

8. Meeting Modality (Mentorship with CRxS)

The IT consultant must commit to attending periodic mentorship sessions with CRxS and MAR Fund. The final schedule will be agreed upon, choosing between:

- **Option 1:** Biweekly meetings of 2 hours (12 sessions total) for strategic follow-up, progress review, and milestone validation.

Consists of biweekly meetings of two hours each, resulting in approximately 12 sessions over six months. This approach is designed to facilitate in-depth strategic discussions, comprehensive progress reviews, milestone validation, and guidance on key decisions while allowing sufficient time between meetings for implementation activities.

- **Option 2:** Weekly meetings of 1 hour (24 sessions total) for continuous mentorship, follow-up, and functional guidance.

Consists of weekly meetings of one hour each, resulting in approximately 24 sessions over six months. This modality provides more frequent touchpoints, enabling continuous mentorship, regular follow-up on ongoing activities, timely identification of challenges, and ongoing functional guidance throughout the implementation process.

Both options represent approximately 24 hours of total estimated mentorship engagement time over 6 months and represent the same estimated level of effort and total engagement time. The final meeting schedule and modality will be agreed upon by both parties at the beginning of the mentorship, taking into consideration project needs, implementation pace, and participant availability.

9. Place of work

All work will be virtual.

10. Confidentiality and copyright

10.1. Confidentiality

The IT Consultant commits to carrying out the assigned tasks with the highest standards and ethical considerations. MAR Fund reserves the right to instruct the IT Consultant on the information that must be treated with confidentiality.

10.2. Copyright

MAR Fund holds the copyright to the products generated through this mentorship.

11. Key Qualifications

- **Education:** Degree in Computer Science, Systems Engineering, IT, or a related field.
- **Zoho Expertise:** Experience designing, configuring, and deploying Zoho applications.
- **System Integration:** Experience integrating legacy systems and external platforms (such as Odoo) using APIs.
- **Process Analysis:** Strong skills in mapping, optimizing, and digitizing manual workflows.
- **Training & Documentation:** Experience developing technical manuals and delivering user training.
- **Collaborative Model:** Ability to work under a strategic mentorship and knowledge transfer framework.
- **Language Proficiency:** Fully bilingual in English and Spanish with strong written skills.
- **Sector Experience (Preferred):** Familiarity with NGO operations, grant management, and project cycles.

12. Documentation required

- **Curriculum Vitae (CV):** Detailed resume showing relevant Zoho and IT experience.
- **Technical & Financial Proposal:** A clear document outlining the development methodology, timeline, and budget.
- **Professional References:** At least three verifiable contacts from similar Zoho or system integration projects.
- **Portfolio (Optional but recommended):** Brief examples or case studies of previous Zoho implementations developed.

13. Application deadline

Send your application and documents described in Section 12 to Judith Morales, jmorales@marfund.org and Patricia Cabrera, pcabrera@marfund.org no later than September 11, 2026.

Considerations:

- MAR Fund is an organization committed to equity and diversity in the workplace. Our contracting policy ensures that all decisions—from recruitment to professional development—are based on merit and individual qualifications. We have a zero-tolerance policy on any form of discrimination or harassment. As an organization working toward the conservation, restoration, and sustainable use of marine and coastal ecosystems in the Mesoamerican Reef, we seek to integrate diverse perspectives and encourage applications from candidates of all backgrounds and sectors to strengthen our mission.
- Proponents are responsible for all costs associated with the preparation and presentation of proposals submitted to MAR Fund for evaluation on the framework of this request for proposals, and therefore there is no obligation on behalf of MAR Fund to cover such costs – either in whole or in part – or to provide any advance or compensation if their proposal is not selected.
- Proponents acknowledge and accept that the preparation of the proposal(s) does not constitute a financial obligation on behalf of MAR Fund, and therefore the economic and financial responsibility for the preparation of the proposal(s) is exclusive of the proponent(s), regardless of the selection process outcome.
- The selection process will be carried out in accordance with MAR Fund’s internal evaluation guidelines and the result will be final.
- Only applicants who advance to the next stage of the selection process will be contacted, and due to the number of applications, MAR Fund will not provide feedback to applicants at any stage of the evaluation process.