

Selection procedure for Consultancy and Support Services (CSS) for organisations mainly based in Europe, Canada and USA

Terms of Reference

I. Goal

The Client promotes development cooperation by supporting the development work of partner organisations based in the regions stated above. Information about the Client is available at <https://www.brot-fuer-die-welt.de/en/bread-for-the-world/>.

The Client finances the development work of partner organisations with German public funds, church funds and donation funds, which the partner forwards to partner organisations. The cooperation between the Client and the partner organisations is based on cooperation agreements that implement, among other things, the requirements to which the Client itself is bound on the basis of its obligations towards its donors (including the German Federal Ministry for Economic Cooperation and Development).

The aim of consultancy and support in the areas of financial management (Lot 1) and outcome-and-impact-oriented planning, monitoring and evaluation (PME) (Lot 2) is to enable the partner organisations to meet the minimum requirements associated with funding by the Client laid down in the respective cooperation agreement with the partner organisations. A description of the cooperation with partner organisations can be found within **Annex 1**.

Consultancy and support for partner organisations can take the form of individual consulting, training and workshops for individual partner organisations or training and workshops for staff of several partner organisations. The Contractor chooses the consultancy approach and the method in consultation with the partner organisations and the Client, taking into account the needs, framework conditions and prerequisites of the partner organisations/partner field. Where appropriate, digital consulting formats shall be offered and implemented.

The consultation, support and training of partner organisations should be designed in such a way that the respective staff disseminate and apply the acquired knowledge as multipliers in their organisations in their own context in order to create sustainable capacities for the fulfilment of funding agreements in partner organisations.

II. Role of the Contractor

The Contractor supports and advises the partner organisations on behalf of the Client. The Contractor is not the Client's representative towards the partner organisations and neither the partner organisations' representative towards the Client. The Contractor shall not perform any functions that are typical of the Client's project processing tasks. The Contractor shall support communication and dialogue between the Client and the partner organisations without taking it over. Direct communication and dialogue between the Client and the partner organisations shall be maintained.

The Contractor does not have any decision-making powers concerning the cooperation relationship between the partner organisations and the Client. The Contractor must not perform any task which may give rise to a conflict of roles or interests in the deliberations on compliance matters. This excludes, in particular, the Contractor from carrying out or participating in evaluations or audits of the partner organisations in question.

III. Objective of the contract

The aim of the contract and thus of the consultancy and support services to be provided is to strengthen the capacities of partner organisations in the areas of financial management (Lot

1) and outcome-and-impact-oriented planning, monitoring and evaluation (PME) (Lot 2) so as to meet the Client's funding requirements on these areas.

The achievement of contract objectives is reviewed by the Client based on feedback from partner organisations and from the Client's staff responsible for supporting the partner organisations.

IV. Partner field

The client, Brot für die Welt, maintains project and program-related partnerships with more than 35 international civil society organizations and networks that engage supra-nationally or globally for justice and sustainable development. More than 25 among these partner organizations, both church-related and secular, have their headquarters in eight European and two North American countries.

Brot für die Welt's cooperation with them focuses on food security and poverty reduction, climate change, human rights and strengthening civil society among other themes. Their projects aim to influence policies towards promoting sustainable development, coping with the effects of climate change and structurally improving the living conditions of marginalized groups and communities. To this end, many of the international partner organizations and networks engage in advocacy work in global spaces and/or provide capacity training for their national members and partners.

Worldwide partner organizations are generally international umbrella organizations, alliances, networks and NGOs with differently shaped organizational structures. Their global approach and way of working often lead to multi-layered effect chains in their programs and projects and imply multi-level and multi-stakeholder planning, monitoring, accounting and reporting procedures. The complex organizational structure means equally high demands for financial management and reporting systems since complicated audit constructions (with auditors based in several countries with different currencies) are often necessary when project funds are forwarded from global headquarters to implementing regional organizations. This complexity of global outcome monitoring and financial management will require supra-national consultancy expertise in these fields.

The total annual volume of approvals for worldwide projects currently stands at about 13 million Euros. Most of the project grants are approved for a duration of three years. Many of them include German Federal funds entailing specific requirements with regard to financial management, monitoring and reporting.

With regard to financial management, approximately 10 requests are expected annually from international PO. The estimated number of days will approximately amount to 30 days (including travel time, if applicable).

With regard to outcome and impact-oriented planning, monitoring and evaluation, approximately 10 requests are expected annually from international PO. The estimated number of days will approximately amount to 50 days (including travel time, if applicable).

Carrying out the contract may imply travel to partner organisations at their respective location. In order to reduce CO2 emissions and because of the current Covid19 crisis, the consultation work shall mainly be done via e-mail and skype/telephone. A consultancy on site is possible as well but special reasons will have to be submitted to BfdW along with a declaration of clearance with regard to Covid19.

The Contractor must carry out the services by taking into account the needs of the partner organisations and their staff. This includes an adequate handling of the individuals (participants) being advised, in particular with regard to gender issues. The services of the Contractor shall be adapted to the language of the target group and/or persons advised/participants and will be provided in English and preferably as well in French and/or Spanish. Communication with the Client takes place in English. Knowledge of German is an

additional asset. The Contractor shall ensure that the persons entrusted with the performance of the contract do have the respective language skills.

V. Areas and tasks, Lots

The tasks and areas for Lot 1 and Lot 2 are described below. In all other respects, the requirements set out in these terms of reference apply to both Lot 1 and Lot 2. As described under III (Objective of the contract), the consultancy and support services in both lots are designed to enable and strengthen partner organisations to meet the funding requirements in the areas of financial management and outcome-and-impact-oriented PME.

Lot 1: In the area of financial management, the consultancy and support services comprise the following areas and tasks:

- Identification of consultancy and support needs of partner organisations regarding financial issues which are related to funding requirements
- Support in meeting funding requirements in financial/budget planning, monitoring the development of income and expenditure projections and preparing financial reports
- Support in implementing specific changes in the partner organisation and/or the project necessary to meet the funding requirements of the Client
- Support in identifying possible further consultancy needs that go beyond selective changes
- Support in the selection and commissioning of auditors related to funding by the Client
- Support in the preparation of audits of the Client's partner organisations
- Support with follow-up of audits, in particular by evaluating the results of the audit report and the management letter as well as identifying and, if necessary, implementing consequences/recommendations resulting from the audit report
- Supporting the dialogue between the Client and partner organisations in the above areas and other issues related to funding requirements

Lot 2: In the area of outcome-and-impact-oriented planning, monitoring and evaluation (PME), consultancy and support services cover the following areas and tasks:

- Identifying consultancy and support needs of partner organisations regarding compliance with funding requirements in the field of outcome-and-impact-oriented PME
- Advisory services on meeting funding requirements with regard to outcome-and-impact-oriented PME and preparation of narrative interim and final reports. These include a stringent analysis of the outcome and impact logic and the coherence of planning with regard to problem analysis, target groups, objectives, indicators and activities, realistic objectives and indicators formulated at outcome and impact level, a monitoring system that includes regular, evidence-based measurement of outcome and impacts, and outcome-and-impact-oriented reporting based on objectives and indicators
- Support with the implementation of specific changes in the partner organisation and/or the project that are necessary to meet the funding requirements
- Support with identifying possible further consultancy needs that go beyond selective changes
- Supporting partner organisations in the preparation, implementation and follow-up of evaluations related to funding by the Client. This includes, for example, support in preparing the terms of reference, the selection of evaluators, implementation monitoring and follow-up (responses to recommendations and implementation planning)
- Supporting the dialogue between the Client and the partner organisation in the above areas and other issues related to funding requirements

Optional: Provision of services for Bread for the World (not covered by the award procedure)

In addition to the above-mentioned consultancy and support services in the fields of "financial management" and "outcome-and-impact-oriented PME" for partner organisations, the contracting authority also frequently commissions contractors to provide services for the client.

The services listed below are optional and can be ordered separately by the client if required and with the consent of the contractor. In this case, logistical-organisational services are remunerated at 70 percent of the agreed gross daily fee and content and technical support at 100 percent of the agreed gross daily fee.

- Organisational and logistical support for
 - planning and accompanying project, journalist and delegation trips to the region and
 - the organisation of national and regional events, workshops, partner consultations, exchange meetings etc. such as planning of travel routes, organisation of transport (including ticket bookings), premises, accommodation, meals.
- Content and technical support such as:
 - Support in translating and proofreading BfdW documents (checking their comprehensibility according to contextual criteria)
 - Advice and support in the preparation of content regarding cooperation with partners for public relations work
 - Support for/contributions to the further development of consulting concepts
 - Creation of updates to contextual information from the region (regularly or ad hoc as required)
 - Contributions to relevant topics in the cooperation (by the Contractor itself or by commissioning studies, support and advice in the preparation of performance specifications, identification of consultants, etc.).
 - Support in the local preparation of newly arrived personnel seconded by the Client (information/sensitisation of the partner organisation to details of partner placement, implementation of country introductions specifically adapted for the seconded personnel) and scholarship work.

The services are not the subject of the award procedure and are not the subject of the evaluation of the tenders. There is no obligation to perform the services.

VI. Procedure and demand

Services are provided in close coordination with the Client and partner organisations. The services to be rendered depend on the needs of the partner organisations during the contract period. The scope of the service depends on the needs of the partner organisations. For each year, a planning overview (list of specific assignments planned and implemented, see annex 1 to the framework agreement) is drawn up, which forms the basis of the annual contracts to be concluded for each 12-month period (Annex 2 to the framework agreement). The Client and the Contractor shall maintain close coordination based on regular consultations. Upon consultation, the parties may decide to deviate from the planning overview.

The training material to be made available to the partner organisations by the Contractor shall also be coordinated within the framework of regular coordination meetings. Material developed by the Contractor for consultancy and training purposes shall be made available to the Client in advance upon request. The Client has the right to demand the adaptation of material for training and consultancy purposes. Before using the training material, e.g. for group training courses, the Client's agreement on the training material must be obtained. Such material shall be sent to the Client in good time before the planned use, providing sufficient time for the Client

to review them as needed and communicate comments and changes required to the Contractor within a reasonable period of time.

Based on the consultancy needs from previous years, the Client estimates the consultancy volume per year during the contract period as follows:

- For lot 1 (Financial management): approximately 30 days
- For lot 2 (outcome-and-impact oriented PME) approximately 50 days

However, depending on the needs of the partner organisations, this range may be exceeded or undercut. Travel activity is included in the above number (for further information on the remuneration of travel days, see **Annex 3**). The Contractor is not entitled to a commission of a specific range.

For both Lot 1 and Lot 2, consultancy and support is needed by partner organisations in all phases of the project cycle.

The Contractor shall respond to requests for consultancy and support from partner organisations within a reasonable time. Training courses shall always be held in the period in which they are scheduled in the planning overview. Training courses - even those which have not yet been incorporated into the planning overview - must be carried out with an appropriate lead time. Appointments are to be announced to the Client and the partner organisations in good time and communicated appropriately.

VII. Preparation and support by the Client

When a contract is concluded, the Client shall systematically prepare the Contractor or their staff for their work and train them with respect to the Client's funding requirements in the area of financial management and outcome-and-impact-oriented PME, as stipulated in the cooperation agreement.

Participation in the Client's induction and training sessions is mandatory. Depending on the type and scope of the agreed service(s), several staff of the Contractor may receive training. Contractor's employees to be trained are those who will actually be involved in delivering the services. The number of the Contractor's employees to be trained is limited to those persons required to deliver the services. The Contractor must ensure that the employees who have been trained by the Client are those who actually carry out the consultancy and support of the partner organisations.

The training provided by the Client is based on a modular curriculum and takes place in a combination of online modules and classroom training at the Client's headquarters in Berlin. The introductory training has a duration of six days or 48 working hours and is conducted in digital format over a period of several weeks. Subsequent consolidation and – if necessary – updates are possible both online and on site. Trainings¹ can also be held in partner countries and are also conceivable in a peer-to-peer-process.

The Contractor will receive training material from the Client for the training of partner organisations, which may be used to perform the task and, if necessary, be adapted, for example, to the specific needs of partner organisations in the respective country/region.

Sample material for training provided by the Client and sample material for training partner organisations are attached in **Annex 2**.

The Client shall bear the costs of transport, accommodation and meals during the training courses for the Contractor; no remuneration for participation in the training courses shall be paid.

As part of the induction training, the Contractor shall also receive an introduction to the work performed by the Client. Should any changes occur on funding requirements, related

¹ Training covers both the training of consultants based on the curriculum as well as additional training and updates on the Client's funding requirements.

standards or procedures or in the Client's organisation during the contract period, the Contractor shall be informed accordingly and receive appropriate training. A virtual platform for the exchange of information and knowledge between Client and Contractor will be set up.

There will also be opportunities for the Contractor and other companies working on behalf of the Client to share their experiences.

VIII. Requirements for carrying out contract-related work

The following areas of expertise must be covered in carrying out the contract.

1. Specialist expertise

Lot 1: Financial management: Credentials in financial management, administration of donor funds, financial management software, capacity building for financial management

Lot 2: Outcome-and-impact-oriented planning, monitoring and evaluation (PME): Development policy work, strategy development and project design, planning, monitoring, evaluation, capacity building for outcome-and-impact-oriented planning & monitoring

2. Professional expertise (superordinate)

Planning and design of training courses, design of consultations, implementation of specifications and donor requirements in projects

3. Methodological expertise

Expertise in facilitation, didactic skills, ability to work with groups, systemic view, analytical skills, capacitating to take action, participative techniques, promoting a culture of constructively dealing with conflicts

4. Digital competence

Competence in the planning and implementation of training and consultation in different digital formats. Ability to design and implement digital formats according to the needs of the target group.

5. Self-competence

Understanding of roles, self-reflection, self-confidence, unlearning, willingness to innovate

6. Social competence

Empathy, communication skills, relationship building, ability to focus on potential and strengths, change of perspective, adequate handling of target groups, sensitivity to gender issues, adequate handling of emotions

IX. Results/documentation/reporting

Reporting shall be done in line with provisions under No. 10 of the Framework Agreement.

Once the contract has been awarded, additional detailed agreements can be made with regard to the monitoring of consultancy and training activities, reporting on services provided and performances rendered to ensure transparency and quality assurance of measures that have been enacted.

X. Technical equipment/work space

The Contractor shall conduct training and consult with partner organisations at the partner organisations' sites or digitally as well as by phone or email.

The Contractor must be available by telephone and email during normal business hours in the country/region in question. The Contractor shall use generally accepted file formats for communication with the Client and partner organisations. The Contractor must have the necessary software and hardware available for word processing, spreadsheets and presentations and to be able to implement consultancy services in digital formats.

Annexes:

Annex 1 Financial support to projects and the role of CSS

Annex 2 Example documents on contractor training conducted by the Client and example documents on training partner organisations