



INVITATION TO TENDER

Subject of the Tender: Pooled Funding Mechanism Consultancy

TO: Bidders
FROM: Adeso - African Development Solutions
DATE OF ISSUE: 13th March, 2017
CLOSING DATE: 4th April, 2017
CLOSING TIME: 16.00 EAT

Adeso together with other local and national NGOs have come together to form a global network which was launched in May 2016 at the World Humanitarian Summit in Istanbul, Turkey. The network, NEAR (Network for Empowered Aid Response), is a movement of local organizations with a bold ambition – to reshape the top-down humanitarian and development system to one that is locally driven and owned, and is built around equitable, dignified and accountable partnerships.

The overall objective of the research is to identify tools and mechanisms to improve access to financial resources for local actors. This consultant will support NEAR to move forward with its commitment to a national pooled funding mechanisms managed by local and national organizations to meet the 25 % direct resource flow to local NGOs by 2020 as per the Grand Bargain target. The existing UN pooled funds at country level should be made more accessible to local and national NGOs with 80% earmarked for local and national actors. The World Humanitarian Summit Global Consultation's summary report, also endorsed the creation of a SNGO managed pooled fund to increase direct finance to local actors. This research project aims to contribute towards ensuring greater efficiency and accountability of humanitarian funds as humanitarian needs continue to grow. The project will focus on the research and design of a flexible, multi donor, multi-sectorial pooled funding mechanism to be managed at the national level. Research will map existing pooled funding mechanisms to identify best practices that can be adopted for the network; creating evidence base; and identifying appropriate mechanisms for establishing the fund. This includes reviewing opportunities to establish a fund utilizing an Islamic social financing model in addition to conventional models for financing pooled funds.

The network will take steps to set up a pooled funding mechanism with engagement of institutional donors, foundations, INGOs and private sector. The research framework will focus on identifying best practices for determining the most effective mechanisms for managing pooled funds.

The firms and individuals who wish to participate in the tender can download the **Terms of Reference (ToR)** from Adeso's website by visiting <http://adesoafrica.org/get-involved/jobs/> and submit the complete and detailed full-fledged proposal detailing how they propose to undertake the whole exercise. Proposals must be received by **4 April 2017**. Late bids will not be accepted.

Should you experience any difficulties accessing the ToR, please contact us at jobs@near.ngo.

Terms of Reference - Pooled Funding Mechanism Consultancy

Organization	NEAR - Network for Empowered Aid Response www.near.ngo (Hosted by Adeso - African Development Solutions, www.adesoafrica.org)
Position Title	Consultant: Pooled Funding Mechanism
Reporting To	NEAR Executive Director
Working With	NEAR Program Manager
Duration	Maximum of 70 days (Offers expected)
Starting Date	April 2017

ABOUT ADESO

Adeso is an expanding and vibrant African based international development and humanitarian organization. At Adeso, we work with African communities who are yet to realize their full potential; working inside these communities to create environments in which Africans can thrive. Our belief that economic, social and environmental security is the bedrock of a healthy community drives the nature and intent of our programming. We work to prevent and overcome situations that adversely affect community well-being by: reinvigorating the economy, developing skills for life and work, providing humanitarian aid, and influencing policy.

ABOUT THE NEAR NETWORK

Adeso together with other local and national NGOs have come together to form a global network which was launched in May 2016 at the World Humanitarian Summit in Istanbul, Turkey. The network, NEAR (Network for Empowered Aid Response), is a movement of local organizations with a bold ambition – to reshape the top-down humanitarian and development system to one that is locally driven and owned, and is built around equitable, dignified and accountable partnerships.

CONTEXT

The overall objective of the research is to identify tools and mechanisms to improve access to financial resources for local actors. This consultant will support NEAR to move forward with its commitment to a national pooled funding mechanisms managed by local and national organizations to meet the 25 % direct resource flow to local NGOs by 2020 as per the Grand Bargain target. The existing UN pooled funds at country level should be made more accessible to local and national NGOs with 80% earmarked for local and national actors. The World Humanitarian Summit Global Consultation's summary report, also endorsed the creation of a SNGO managed pooled fund to increase direct finance to local actors. This research project aims to contribute towards ensuring greater efficiency and accountability of humanitarian funds as humanitarian needs continue to grow. The project will focus on the research and design of a flexible, multi donor, multi-sectorial pooled funding mechanism to be managed at the national level. Research will map existing pooled funding mechanisms to identify best practices that can be adopted for the network; creating evidence base; and identifying appropriate mechanisms for establishing the fund.

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SCOPE OF WORK:

1. Conduct a participatory research study to identify best practices in governance, management, service provision and accountability among existing pooled funds.

- Map and assess existing pooled funding mechanisms being employed by the development and humanitarian sectors.
- Identify best practices and schemes that are most suitable options for the adoption by the Network members.
- Lessons should be drawn from the START Financial Enablers project (Oxfam), the Global Fund for Aids, TB and Malaria, INGO managed funds in country (i.e. Concern in Pakistan), basket funds and UN Managed pooled fund and more.
- The research results should provide analyses and recommendations for the design of the pooled funding mechanism for the Network, looking at both funding from institutional bilateral donors and from national private philanthropy, private sector, Diaspora, and Islamic financing. The fund should have flexibility to absorb funding from different groups and not be restrictive to funding from bilateral donors in humanitarian action. There should be analysis of opportunities to create synergies with upcoming social justice and civil society financing mechanisms and movement of national and community foundations emerging.

2. Develop a strategy paper identifying a range of possible fund models outlining the structure, rationale, a pilot approach and funding strategy.

- The strategy should focus on creating 3 different pooled funding models looking at pure bilateral/humanitarian context, development and middle income context, and Islamic Social Financing model.
- The strategy will identify the scope, process and strategy for pool funding mechanism engaging institutional donors, foundations, Islamic Banks, the public, INGOs, and private sector.
- Identify and recommend the pilot countries and selection criteria, management structure, fundraising strategy and other key processes.
- Undertake site visits and stakeholder interviews to understand the needs of both the donors but also medium and small size SNGOs, businesses, and national governments to inform us about the structure of the pooled fund.
- Develop innovative pooled funding ideas and mechanisms with various thematic focus areas that are of demand and interest of the network.
- Identify innovative ideas such as creating an endowment, working with private sector on investment fund and Islamic social financing.

3. Launch research report on pooled funding and fundraising strategy, specifically looking at the Islamic Social Financing model and strategy development.

- Develop detailed pooled funding strategy document to be presented to potential donors, government representatives, local NGOs and other stakeholders in pilot countries.
- Assist in identifying qualified agencies to manage the pooled fund in 1 pilot country for the Islamic Social Financing model. This will include working on research and design, giving access to introduction and lead research on key informants.
- Schedule and participate in round table meetings for donors and stakeholders in order to establish funding and promote pooled funding strategies.

CONSULTANCY PERIOD

The consultancy should be completed by June 2017 with key milestones for deliverables outlined below. The consultant/team should factor into their offer, budget for travel to pilot countries, and the drafting in of expertise in specific types and models of finance where necessary, and other costs considered necessary to the completion of the above outlined tasks.

DELIVERABLES/ACTIVITIES	DUE DATES
Research on Existing Pooled Funds Mechanisms	
<ul style="list-style-type: none"> Research and development of report 	<ul style="list-style-type: none"> Mid-April 2017
Develop Strategy Paper	
<ul style="list-style-type: none"> Develop strategy document for the structure and selection criteria of pooled funding mechanism. Production and printing of documents. 	<ul style="list-style-type: none"> Draft for review by May 2017 (Pilot scoping studies to be carried out in April/May). Final approved version ready for production 15 May 2017.
Launch events/validation meeting	June 2017

SKILLS AND QUALIFICATIONS

- Expertise and knowledge in pooled funding mechanisms.
- Understanding of efforts of expanding national philanthropic efforts through national foundations, community foundations and private fundraising.
- Postgraduate degree in a social science field (political science, sociology, anthropology, etc.).
- Experience working with or for non-governmental organizations.
- Knowledge of humanitarian and development and social justice/civil society financing mechanisms
- Excellent analytical skills.
- Excellent command of oral and written English.
- Ability to explain technical issues in a user-friendly manner.
- At least five years of experience in conducting research.
- Familiarity with development and humanitarian issues.
- Cultural awareness and sensitivity to diversity and gender issues.

APPLICATION PROCESS

All applications should be sent in PDF format to jobs@near.ngo by **April 4, 2017** with **'Pooled Funding Mechanism Consultancy'** on the subject line. The selection committee will review all applications on a rolling basis.

All applicants must meet the minimum requirements described above, and those unable to meet these requirements will not be considered.

Each application package should include the following:

- An application letter addressing the selection criteria including how the consultant's previous experience matches the consultancy objectives as well as the interest for the position. It should also indicate the candidate's availability and consultancy rates. The letter should be no longer than two pages;
- A detailed full-fledged Proposal detailing how the candidate proposes to undertake the whole exercise.
- A sample of recent work;
- Updated CV including relevant work experience and qualifications
- Contact details of 2 references.

Applicants who meet the requirements described above will receive first priority. The NEAR Network is an equal opportunity employer.