

**TERMS OF REFERENCE**  
**FOR**  
**EXPRESSION OF INTEREST (EOI)**  
**PREPARATION OF A COMPREHENSIVE ORGANIZATIONAL SUSTAINABILITY**  
**STRATEGY**

**1. Introduction**

The Partnership for African Social and Governance Research (PASGR) is an independent, non-partisan Pan-African not-for-profit organisation established in 2011 and located in Nairobi, Kenya. Currently engaged in more than 26 African countries, PASGR works to enhance research excellence in governance and public policy that contributes to the overall wellbeing of women and men. In partnership with individual academics and researchers, higher education institutions, research think tanks, civil society organisations, business and policy communities both in the region and internationally, PASGR supports the production and dissemination of policy relevant research; designs and delivers suites of short professional development courses for researchers and policy actors; and facilitates the development of collaborative higher education programmes.

PASGR's vision is '*a vibrant African social science community addressing the continent's public policy issues*' with a mission of *advancing research excellence for governance and public policy in Africa* is delivered through three core programmes: Higher Education, Research & Policy, and Professional Development and Training.

PASGR seeks a consultant to develop a comprehensive and effective organizational sustainability strategy (including business, human resource and financial sustainability) to guide the sustainable performance of the organization and its impact. PASGR is donor funded and the advent of the COVID-19 followed by dynamic donor priorities have made it increasingly vulnerable, forcing it to rethink its organizational-wide sustainability strategy as a key component of its value proposition. The strategic rethinking entails a thorough investigation and 360 review of PASGR's three core areas:

- i) Strategy and positioning to assess how PASGR plans its work especially on the following areas:
  - Strategic direction, planning and execution with a goal of identifying, analysing and addressing key sustainability issues to establish a pathway for driving PASGR as a going concern for the next decade and beyond;
  - Context and positioning of its overall model including identification of features that set PASGR apart from similar organizations and how these be leveraged to drive success;
  - Donor and stakeholder mapping and analysis
  - Key drivers of demand for its programmes;
  - The environmental and social context in which PASGR operates;
- ii) Strategic management issues to help PASGR achieve its Strategic plan with key emphasis on:
  - PASGR operating environment, leadership, human resource, intellectual capital, workplace organization and culture

- Detailed reviews of staffing requirements, and performances assessment;
  - Programmes/project management;
  - Budgeting and costing; and
  - Relevant systems and processes needed;
- iii) Finance and funding focusing on how PASGR can source and widen its financial resources sustainably on a going-concern basis, and how they are managed. Key areas of focus include:
- Funding model and fund raising approaches
  - Sound financial management and security
  - Potential investments (e.g., endowment funds e.tc) that PASGR can consider
  - Business risk identification, assessment and management;
  - Fundraising strategies including a combination of grants applications, soliciting in-kind support, third party funding, user fees for cost recovery, public funding, securing endowments, membership fees.

Accordingly, PASGR is seeking an experienced and dynamic consultant to conduct a comprehensive analysis of the organizational sustainability strategy for the next decade, divided into three phases: short (2-3 years), medium (3-6 years) and long-term (over 6 years) strategies. The outcome of this assignment will enable the organization to evaluate progress made and the resources needed in delivering the current 2019-2023 Strategic Plan and other aspirations in the near future. The results of this assignment is also expected to help PASGR understand the programmatic and financial landscape it operates in and creatively deliver future milestones through forging effective partnerships on the African continent and potential partners outside Africa.

The consultant shall design and deploy suitable tools to undertake an in-depth analysis of sustainability issues and generate a set of sustainability indicators. The indicators will provide a basis for developing and assessing the viability of alternative courses of actions/scenarios for achieving organization sustainability effectively and efficiently. The Consultant will rationalize and recommend the best course of action/scenario for PASGR and provide sound advice on managing strategic change: what works, how and why.

## **2. Objective of the Consultancy**

The main objective of this assignment is to develop a robust and comprehensive organisational sustainability strategy for PASGR's current and future growth trajectories as well as its financial and human resource needs. The Consultant will work collaboratively with PASGR staff and selected stakeholders to deliver on the objectives of this assignment. PASGR will facilitate access to information on its programmes and funding sources as well as their future prospects. Quality will be assured through a process of continuous engagement, review and feedback on work in progress.

## **3. Scope of Work**

The consultant selected for this work will be responsible to deliver fully on the objective of this consultancy. In addition to the three core strategic focus mentioned in the introduction, specifically, the consultant is also expected to:

- i) Analyse PASGR current and future development of PASGR programmes' trajectories their required optimal human resource capacities, requirements and performance;

- ii) Conduct an in-depth analysis and assessment of PASGR's internal assessment and the required optimal staffing needs, capacities and performance of administrative staff needed to support programme teams;
- iii) Conduct an in-depth stakeholder mapping and analysis and draft a comprehensive report that includes but not limited to list of relevant stakeholders and their ranking in terms of influence, power, and interest;
- iv) Analyse and align PASGR current and future financial needs to its core mandate, growth trajectories and different business continuity models;
- v) Undertake a donor mapping and analysis and draft a comprehensive report which includes but is not limited to:
  - List of donors including bilateral and multilateral donors, foundations, and companies whose policies and practices uphold human rights principles;
  - Donors' key thematic/ focus areas and their alignment with PASGRs' work and strategic plan;
  - Donors' key opportunities, their funding schedule/timeframe and options;
  - Donors' COVID-19 related interventions and opportunities;
  - Donors' grant and contract processes and main compliance requirements.
- vi) Develop a fundraising strategy that incorporates among others, PASGR's funding base, different financing mechanisms, and strategic alliances with other institutions;
- vii) Develop three distinct business development models/cases to support PASGR's core mandate and future sustainability;
- viii) Develop a brief, clear and robust Monitoring Evaluation Accountability Results and Learning (MEARL) framework to track progress on PASGR's sustainability indicators; and
- ix) Provide sound technical advice on change management.

#### **4. Core Deliverables**

The Consultant will deliver the outputs specified below:

- i) An inception report with detailed scope of work and work breakdown schedule that outlines the work plan, timelines, milestones and deliverables.
- ii) A detailed consolidated report logically and coherently detailing the core objectives of this assignment while reflecting PASGR's vision, mission and strategic direction;
- iii) Three detailed sustainability models cases and a recommendation on the most viable;
- iv) A fundraising strategy that also includes a high quality, comprehensive donor and stakeholders mapping and analysis report;
- v) A MEARL framework to track PASGR's sustainability indicators specified in the model;

- vi) Development of slide decks (with infographics) for deliverables (ii) - (iv) above for presentation to internal and external stakeholders; and
- vii) Presentation of deliverables (ii)-(iv) above to PASGR's management and leadership team.

## **5. Methodology**

It is expected that the consultant will carry out a number of activities:

- i) Propose and design a mixed-method approach in responding to different deliverables of this assignment.
- ii) Conduct consultations with PASGR's staff members, donors and stakeholders.
- iii) Review current PASGR Human Resources Policy, Financial Policies, Strategic Plan and other relevant documents;
- iv) Use both SWOC and PESTEL models and other frontier models in developing PASGR's strategic direction and positioning;
- v) Apply relevant human resources planning models and analytical tools to assess PASGR's staffing needs, capacities and performance; and
- vi) Apply state-of-the-art financial planning and forecasting tools to analyse PASGR's financial data and generate relevant projections.

## **6. Minimum Requirements and Competencies**

The consultant must meet the following requirements:

- i) A seasoned financial/business advisor with at least ten years of experience in programme development, strategic plans formulation and implementation, organisational reviews, developing business cases for international organisations, NGOs and not for profit organisations. The consultant team is expected to possess and demonstrate the following qualifications in the core team:
  - At least a Master's Degree in Strategic Management, Financial Planning and Forecasting, Business development, Risk and Compliance, Human resource development, Monitoring and Evaluations;
  - Professional accreditations such as ACCA, CPAs, CFA, risk and compliance, programme management, strategy and change management, human resources management, and monitoring, evaluation and learning.
  - At least ten years' experience in working for the not-for profit sector, especially in programme development, strategic plan formulation/implementation and fundraising.
- ii) Experience in partnership development financing.
- iii) Demonstrable skills and experience in developing realistic financial MEARL indicators for tracking the progress and assessing the financial health of an organisation, especially in the INGOs world.
- iv) Ability to make good judgement and pays attention to nuance and detail, takes initiative, high sense of responsibility, tact and discretion, with sensitivity to different cultures.
- v) Have knowledge and experience in managing donor funds for program/project implementation and is familiar with various international donor expectations. Experience in Africa, particularly sub-Saharan Africa is desirable.

- vi) Be conversant with project fundraising and in mobilising funding from donors in the international community and in Africa for organisations similar to PASGR.
- vii) Be familiar and networked with various donor organisations.
- viii) Excellent leadership, organisational and time management skills.
- ix) Excellent communication skills including in presentations, report writing and research.

## **7. Supervision**

The Consultant will be expected to be self-motivated and able to work independently. **PASGR's Executive Director** will provide supervision and support including induction to the work, provision of the relevant background documents, and links to the relevant internal and external stakeholders. PASGR's Senior Management Team will provide a general support and advice.

## **8. Timeframes**

It is anticipated that the assignment will be completed within a total of eight to twelve (8-10) weeks from the date of the signing of the contract between PASGR and the Service Provider. All work must be completed by the **December 15, 2021**.

## **9. Response to the EOI**

Please respond to this EOI with **not more than 15 pages technical and financial proposal (including all attachments)** to [bids@pasgr.org](mailto:bids@pasgr.org) by **12:00pm EAT Wednesday, September 29, 2021**.

The EOI proposal should cover:

- a) Your understanding of the assignment;
- b) Evidence of past work experience;
- c) A proposed approach and methodology for carrying out the assignment;
- d) Core team, responsibilities and level of effort;
- e) A detailed work plan, timeframes and milestones.
- f) A financial proposal that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs for each task or element in the ToR.

Any inquiries can be sent to the same email and shall be collectively responded too **not later than Friday, September 24, 2021**.