

**TERMS OF REFERENCE  
FOR  
EXPRESSION OF INTEREST (EOI)**

**A COMPREHENSIVE REVIEW AND UPDATE OF PASGR'S INTERGRATED FINANCE,  
GRANTS AND PROCUREMENT POLICIES AND PROCEDURES MANUALS**

**1. Introduction**

The Partnership for African Social and Governance Research (PASGR) is an independent, non-partisan, Pan-African, not-for-profit organization established in 2011 and based in Nairobi, Kenya. PASGR's vision is to create *a vibrant Pan-African interdisciplinary knowledge community that addresses the continent's governance and social policy needs*. PASGR was founded to revitalize research and training capacity in public, social policy, and governance in Sub-Saharan Africa and to assist key African research and higher education institutions in playing an active and independent role in development discourse at both the local and regional levels.

Currently engaged in more than 26 African countries, PASGR works to enhance research excellence in governance and public policy, contributing to the overall well-being of women and men. In partnership with individual academics and researchers, higher education institutions, research think tanks, civil society organizations (CSOs), and business and policy communities, both within the continent and internationally, PASGR supports the production and dissemination of policy-relevant research, designs and delivers suites of short professional development courses for researchers, policy actors and university teaching staff and facilitates the development of collaborative higher education programmes.

PASGR strives to adhere to the highest standards and best practices of financial probity and endeavours to adhere to best practices in the management of its financial resources including transparency, accountability, quality and integrity of its programmes. To stay abreast of the changing needs of the organizational mandate, increased compliance and regulatory requirements, system and technological changes, diversified funding partners, and increased wider partnerships, PASGR seeks to undertake a comprehensive review and update of the existing finance, grants, and procurement policies and procedures manual. The review of the policy guidelines will further guide the systemic operation of PASGR's day-to-day functions, processes, and procedures.

PASGR thus seeks a consultant to comprehensively review and update and integrate the existing Finance, Grants, and Procurement policies and procedures manual to ensure financial probity, provide efficient financial management, guarantee compliance, risk mitigation, and the alignment of financial, and programmes operations within the overall mission of the organization.

**2. Objective of the Consultancy**

The main objective of this assignment is to comprehensively review and update the current financial and grants management, internal controls, and procurement manual to ensure smooth, effective, and efficient operations that guarantee the highest returns and value for money across PASGR's operations. Since the development of the existing Finance and Procurement manual, PASGR has significantly grown, necessitating the revision of the manual to reflect the current

structure, focus, and strategic direction of the organisation. In addition, PASGR has diversified its funding models and partners; these grants come with requirements, terms, and conditions, and hence the need for their incorporation within the finance, internal controls, and procurement policies and procedures manual.

The consultant will work closely with the Finance and the Senior Management Team to deliver on the objectives of the assignment. PASGR will facilitate access to information on its operating environment and current internal control systems.

### **3. Scope of Work**

The consultant selected for this work will be responsible for fully delivering on the objectives of this consultancy. Specifically, the consultant is expected to:

- i. Review of the existing Financial, Grants and Procurement Policies and Procedures manual in terms of applicability, scope, relevance and adequacy to the PASGR's Strategy to ensure that it is robust, up-to-date and captures best practice standards for an ambitious and growing Pan African Research centred organization.
- ii. Liaise with relevant PASGR staff to ensure a participatory process in coming up with the revised financial, grants and procurement policies and procedures manual and review background documents to incorporate the following but not limited to: -
  - The strategic Plan 2024-2028;
  - Existing Government regulations (both Kenya and USA);
  - Audit recommendations in the last five (5) years;
  - The structure of operations within the organization;
  - PASGR current donor requirements;
  - PASGR's revised operational manuals;
  - New developments and best practices in the field of Accounting, Finance and Auditing
  - Procurement and contracting policies and procedures including PASGR's procurement tool kit,
  - Grants Management procedures
  - Cost allocation policy for projects and donor proposals
  - The International Non-Profit Accounting Standard (INPAS).
- iii. Update the Finance, grants and procurement policy and procedures manuals with the following critical items:
  - Robust substantive internal control, compliance procedures, and audit policies and procedures;
  - Best practices on fraud detection, prevention and mitigation policies and procedures; and
  - Guidance on topics that include taxes regulations in both Kenya and the USA, and some donor requirements.
- iv. Make a presentation of the draft report to PASGR's management and leadership team.
- v. Conduct training to PASGR staff and partners on the revised policy and procedure manual.

### **4. Core Deliverables**

The Consultant will be expected to deliver the following deliverables:

- i. An inception report that shall reflect clear comprehension of the scope of work, the methods of execution and work plan, milestones and deliverables to ensure the outcome is in line with PASGR's expectations.
- ii. A detailed assessment report highlighting gaps and areas for improvement in the existing policy and procedure manual.
- iii. A draft, revised Financial, Grants and Procurement policies and procedures manual that shall incorporate the proposed and agreed changes in line with international best practice and in context of all the PASGR's processes and operations.
- iv. An integrated Financial, Grants and Procurement policies and procedures manual that shall incorporate comprehensive Financial, grants and procurement procedures.
- v. Develop training materials for PASGR's staff on the revised policies, procedures or guidelines as well as conduct training for PASGR employees and partners on the revised policy.
- vi. A detailed report on awareness/training of PASGR's employees and partners.

## **5. Minimum Requirements and Competencies**

The consultant team must meet the following minimum requirements:

- i. Recognized consultant with a minimum of 15 years' progressive experience in financial management or institutional strengthening for the NGO sector with sound background in Finance, Accounting, Auditing and Procurement. Experience in working in Africa is desirable and an added advantage.
- ii. Minimum of a master's degree in accounting, finance, auditing or a business-related field and a Member of ICPAK, ACCA, CFA, CIA, CIPS and in good standing;
- iii. Knowledge and experience in managing multiple donor funds for program/project implementation and is familiar with various international donor expectations, audit and grant compliance.
- iv. Solid knowledge in financial management applicable to General Accepted Accounting Principles (GAAP), International Financial Reporting Standards (IFRS), International Standards on Auditing (ISA), and the International Non-Profit Accounting Standard (INPAS) is desirable.
- v. Ability and experience in assessing financial management training needs and preparing related training materials for international Not for Profit organizations, particularly in Africa.
- vi. At least 10 years' experience in supply chain and procurement procedures of an international development organization and training Not for Profit organizations in Africa is desirable;
- vii. Experience in risk management and fraud prevention.
- viii. Excellent leadership, organisational and time management skills; and
- ix. Excellent communication skills including in editing, writing and presentations.

## **6. Contents of the Proposal**

The proposal should include, but is not limited to the following:

- i. An understanding of the requirements as listed in sections 2, 3 and 4 above;
- ii. Methodology and work plan for performing the assignment.
- iii. Detailed reference list indicating the scope and magnitude of similar assignments.

- iv. Relevant services undertaken in the past three (3) years.
- v. Team composition and task assignment. There should be no change in the team during the assignment unless with prior agreement); and
- vi. CVs of the task team of not more than 5 pages
- vii. 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.

## 7. Evaluation Criteria

Consultants/ Firms shall be evaluated as per below criteria: -

### a) Preliminary Evaluation Checklist

No.	Mandatory Requirements	Max Points (20)
1	Copy of National Identity/Copy of passport Bio page Page of the Consultant/ Copy of List of Directors, Shareholders, and beneficial owners (CR12)	5
2	A copy of certificate of Registration/Incorporation	5
3	Valid trade/Business licence – Current financial year	5
4	A Copy of KRA PIN / VAT Certificate/ A copy of valid Tax Compliance Certificate issued by the Kenya Revenue Authority	5

***The minimum preliminary evaluation criteria to proceed to the technical evaluation is 20 points. Only tenderers who secure the minimum pre-evaluation score will proceed for technical review.***

### b) Technical Evaluation

No.	Requirements	Max Points (70)
1	Scope of Proposal: The proposal demonstrates an understanding of the project objectives and desired results, illustrates an approach to the scope of work that will likely lead to the delivery of the assignment. The proposal illustrates the vendor's ability to successfully execute the proposed approach as well including an appropriate process to interact with stakeholders i.e. partners, board members and staff	10
2	Detailed Methodology/Approach and work plan for implementing the assignment	20

3	Qualification and competence of at least 3 key staff as outlined in 5 above. (Kindly Attach CV /Resumes for the Proposed key staff and respective certificates).	30
4	Experience: Provide a list of at least 5 past/current clients to demonstrate experience in performing similar assignments in the last three years- at least five (5) clients each 2 mks. Total client reference - 25mks.	10

**c) Financial Evaluation Criteria**

5	Financial proposal (including consultancy fees and any related costs).	10
	<b>TOTAL MARKS</b>	<b>100</b>

**8. Supervision**

The Consultant will be expected to be self-motivated and able to work independently. **PASGR's Head, Finance and Administration** 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 guidance and advice.

**9. Timeframes**

It is anticipated that the assignment will be completed within a total of eight to twelve (8-12) weeks from the date of the signing of the contract between PASGR and the Service Provider. All work must be completed by **October 16, 2026**.

**10. 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) no later than **Friday, June 26, 2026. 12:00pm EAT.**

**11. Right to Reject**

PASGR reserves the right, in its sole discretion, to reject any and all responses received in response to this EOI. A contract for the accepted response will be based upon the factors described in this EOI.