



TERMS OF REFERENCE

Consultancy: Facilitation of Mid Term Review+ Process

1. BACKGROUND

1.1) Background to the Partnership

FABIO is a local Ugandan Non-Government Organization located in Jinja that started in 1997 and is registered with National NGO registration board. FABIO seeks to promote the use of sustainable transport solutions with major emphasis on active transport and mass public transport. It uses the bicycle as a tool for improving the livelihoods of the vulnerable communities through enhancing community access to basic services, for example; i) provision of bicycles to vulnerable women groups to access market to sell their produce and also enhance their ability to do the household chores faster hence improving on their productivity; ii) provision of bicycles to Village Health Teams in the rural communities to enable strengthen their effectiveness in supporting communities on health related issues; and iii) provision of bicycles to school going children through the cycle to school program with special emphasis on the girl child in order to improve on female school retention. FABIO also engages in policy advocacy especially on sustainable Transport and Good Governance.

All We Can partners with emerging organisations, groups and churches in some of the world's poorest communities. All We Can chooses to work with these partners because of the vital role they play in addressing issues of poverty and injustice. Recognising the positive impact that the work of committed, effective organisations can have in the lives of the world's poorest and most vulnerable, All We Can's partnership approach focuses not just on financially supporting the programme activities of its partners, but also supporting them to become resilient, thriving and impactful organisations in the long term.

All We Can and FABIO have been in partnership since 2019 and **seek a team of two experienced consultants with MEL and OD experience**, who can support, mentor and accompany FABIO through an MTR+ process. We see this as a MTR "plus" process as it will involve a midterm review of both FABIO's programme and organizational development progress, as well as the updating of their MEL Framework (including a theory of change and measurement plan) based on results and lessons learnt from the MTR for their Programme and OD.

1.2) Background to the partnership approach

To support partners on their organizational change process the partnership between FABIO and All We Can, began with funding support to engage in a strategic planning process, facilitated by an external OD specialist facilitator. This strategic planning process is repeated every 5 years, throughout the partnership together, which can last up to 15 years. The focus of this strategic planning process is to enable partners an opportunity to reflect on their own

identity and mission, conduct an organisational assessment and setting out a clear holistic strategy for their whole organisation, including:

- a) their whole development programme (not just the programme activities All We Can funding will support) and;
- b) for *their own* organisational development (OD) priorities.

This process is not tied to a decision of whether All We Can will fund or not, but rather is used to help each partner and All We Can make decisions about how partners can best invest in their own organisational development over the course of their strategic period – and how All We Can can support them on this journey. This Strategic Plan (SP) is then a tool the partner can use to guide its work over the strategic period. Every year, partners then develop annual operations plans which outline the work that the partner will undertake in a given year to contribute to its Programme and own OD goals and how All We Can's flexible funding can best support this work.

1.2) Rationale for this assignment

All We Can introduced the approach outlined above in 2015. In a 2019/20 evaluation of the first 5 years of All We Can's new approach to partnership (as outlined above) revealed some important lessons:

- The previous strategic planning process did not always facilitate partner identification of the necessary pathways of change to achieve the high level strategic objectives (in other words, intermediate outcome - and output - level results) in their strategy; nor risks and assumptions to monitor over the course of their strategy.
- Because the strategic plans tend to lack outcome and output results that tie to their programmatic and OD strategic pillars and objectives, Evaluators found that partner's annual plans were often activity-based, rather than strategic.
- All We Can's monitoring and quality assurance mechanisms have tracked partners' progress on their annual operational plans year on year, but due to limited articulation of the pathways to change, and assumptions in the logic of 'how this change will happen' in their Strategy, these have not sparked adequate reflection by the partner on the continued relevance of their strategic plans and how their annual work plans contribute to the achievement of their strategic objectives.
- Whilst high-level OD (Organisational Development) outcomes may exist, they are not necessarily translated into clear year-by-year outputs, targets and activities over the five years.

While All We Can's 2015-2020 approach included supporting partners to develop a MEL Framework (consisting of theory of change (ToC) and measurement plan for both their programme, and OD) in the 1-6 months following the finalisation of their SP, these ToCs were not developed in the context of strategic planning and have become separate, rather than integral to the strategy.

Based on the Evaluation findings, Evaluators recommended that

- All We Can revise our strategic planning process to include the clear articulation of logically linked results (for outcomes and year-on-year outputs) underpinning the partner's strategy objectives for both a) their development programme and b) their OD, using a theory of change model. This should include articulated assumptions and risks to

enable partners to regularly test the continued soundness of their strategies, and should be done as a key part of the strategic planning process itself.

- As part of developing their MEL framework, partners identify suitable indicators to help measure these results on outcome and output level over the course of the strategy, setting clear targets for annual (where relevant), midterm and endline.

FABIO is currently midway through their current strategy period and therefore seeks consultant or pair of consultants to facilitate a midterm review of the strategy which includes evidence of progress made, as well as lessons and recommendations that can be incorporated into the remainder of the strategic period. However, FABIO did not develop their MEL framework at the time of developing their SP. While we have worked together to make a start on these Frameworks, the current exercise is being called 'MTR+ 'plus'', because we seek a Facilitator who will facilitate:

- firstly, a **participatory MTR process** of reviewing progress made over the course of the strategy so far against the Strategic Plan (including the draft ToC and indicators FABIO has developed to date);
- following which – and informed by the lessons and recommendations stemming from the MTR – support FABIO to **adapt their ToC** for the remainder of the strategy period, and **identify any indicators** that might be missing from FABIO's existing measurement plan that will be needed to evidence the results in their ToC. This will also include facilitating FABIO to articulate 'resilience milestones' (see below)

2. OBJECTIVES OF THE SERVICE / WORK

The Objectives of this assignment are twofold:

1. Conducting a participatory midterm review: Based on FABIO's Strategic Plan and (draft) ToC and measurement plan, design and carry out a participatory mid-term review exercise. The goal of the midterm review is to evaluate FABIO's development Programme and organisational development and to learn what is working well and not so well in progressing towards the strategy. This will need to include:

- Assessing the extent to which the Programme and OD results are being achieved, including progress towards (or achievement of) outcomes and outputs (as evidenced by data gathered directly by the consultant and existing monitoring data where available).
- Assessing the internal and external context. For the internal assessment, the consultant will need to use the Capacity Development Framework in Annex A to carry out an organisational assessment (OA) with the full staff contingent of the organisation. They will also need to assess the external context and changes using a SWOT or PESTLE exercise. The above will require drawing on existing available monitoring data, as well as data gathering with both internal stakeholders (staff, leadership, Board members) and external (community members and programme participants, government, other stakeholders etc.).
- Assess the 1) relevance 2) coherence 3) efficiency and 4) sustainability of FABIO's Programme and organisational development; and any factors that are likely to influence these (including effectiveness) for the remainder of the strategy. The above will require drawing on existing available monitoring data, as well as data gathering with both internal stakeholders (staff, leadership,

Board members) and external (community members and programme participants, government, other stakeholders etc.).

- As part of this assignment, the consultant will also be required to facilitate the partner to articulate longer-term 'resilience milestones' (in other words where do they want the organization to be when it graduates in 10-15 years) for each of the nine capacity areas in the Capacity Development Framework in Annex A.
- In some cases, FABIO identified indicators for measurement after completing their strategy. In these cases, there might not yet be baseline figures for these indicators. Where possible the consultant should gather retrospective baseline data for indicators during the MTR data collection to be able to assess progress made.
- The MTR approach and methodology used by the Consultant should ensure ownership of both the process and outcome of the MTR exercise by FABIO's team.

2. Finalise the MEL Framework for the remainder of FABIO's strategy period: building on the draft ToC used in the MTR, and informed by the lessons and recommendations made in the MTR, conduct a workshop with staff to fill any gaps in terms of FABIO's theory of change, and indicators in the measurement plan that FABIO will need to measure their Programme and OD over the remainder of their Strategy. This should finalise and/or adapt the MEL Framework ensuring it is relevant and ready for the remainder of the strategy. This includes articulation of 'resilience milestones' (see below)

3. SCOPE OF WORK

To deliver Objective 1, the Consultant is expected to:

1. During inception phase:
 - Kick off call with FABIO and All We Can to discuss the assignment and expectations, and agree on any learning questions FABIO and All We Can seek to answer in the MTR.
 - Study the relevant documents (including, but not limited to the partners Strategic Plan, OA Report, OD Plan, draft ToC and measurement plans, the partners Annual Ops Plans and reports for the strategic period to date, and others where relevant and existing monitoring data available, as well as gaps in data that will need to be collected through data collection during the research phase)
 - Informed by the above, as well as any learning questions the partner and All We Can has, develop a methodology and research framework for the MTR to be approved by FABIO and All We Can. This research framework will need to be submitted as part of the Inception Report to FABIO and All We Can for approval before research/data collection begins. This inception report should also outline the methodology and tools the consultant will use for the research phase.
2. During research phase:
 - Use existing monitoring data gathered by the partner and data collection (FGDs, survey etc.) where gaps exist, with the community programme participants and other relevant stakeholders (govt, NGOs etc.), based on the Strategy, ToC and

indicators. This data gathering exercise will also need to involve an organisational assessment (OA) with FABIO's staff. Where baseline data does not exist, and where feasible within the timeframe of data collection, the consultant should also gather retrospective baseline data for any indicators where baseline data is not yet available. **The consultant must ensure that data collected: establishes a retrospective baseline wherever possible; provides a result for any progress made at midterm, and enables answering of any learning questions identified by the partner.**

3. Facilitate a half-day to 1 day MTR validation workshop process with FABIO staff to discuss and validate data and emerging results and identify lessons and recommendations for the remaining strategy period, for both FABIO's development programme *and* its own organizational development.
4. Draft an MTR report outlining the results of the MTR and lessons and recommendations
5. Facilitate a 1-2 day MEL Framework workshop to review, adapt/finalise FABIO's MEL Framework, including the ToC and indicators in the measurement plan, informed by lessons and recommendations from the MTR for the remainder of the strategic period:
 - a. The ToC diagram should include the outcomes, outputs, activities along pathway of change for both programme and OD; as well as assumptions made in the logic of how change will happen. This mapping exercise should draw build on previous work/ToC used for the midterm review and lessons and recommendations from the MTR. The ToC mapping is not starting from scratch.
 - b. Building on indicators already in use, help partners identify suitable, quality indicators that can measure change on the various levels of the ToC (outcomes and outputs) as well as any assumptions identified in the ToC logic. These indicators may or may not be ones they have already identified or are already be using, but effort should be made to ensure each result and assumption in the ToC has suitable indicators for measurement. Any concepts in the indicators (for example "increased incomes") must be clearly defined, and indicators should also be disaggregated by sex, persons with disabilities and other relevant factors. Emphasis should also be placed on quality over quantity, and if some indicators need to be removed, this should be done through the partner taking the lead.
 - c. As part of the 'forward looking' ToC workshopping, the consultant should facilitate FABIO identify organisational milestones for their journey to organisational resilience – in other words, milestones the partner would like to see achieved by the 10 year and 15 year marks of their partnership with All We Can, for each of the nine capacity areas in the Capacity Development Framework. These are not milestones for the partnership; rather they are milestones for the partner's own organisational resilience that will help FABIO and All We Can understand if the partner is progressing towards organisational resilience and a strong position to continue their work after the partnership with All We Can ends after +/-10-15 years.
6. During the MTR+ exercise, the consultant will need to be available for at least 3 'catch up' meetings with FABIO and All We Can team members.

3.1) Deliverables by Consultants:

- **1 x MTR Inception Report** following the review of all documents that is submitted together with the MTR framework, that outlines the methodology the Consultant will use for the MTR, including data gathering with FABIO’s target communities, staff and other stakeholders as deemed necessary to address gaps in the existing available monitoring data; and the plan for the subsequent participatory development of remaining deliverables. This should include a detailed work plan and final budget. It should include the following sections:
 - Introduction (describe the programme; state the purpose and scope)
 - Midterm review framework, as well as learning questions; discuss the overall approach, risks and limitations)
 - Midterm review methodology (discuss the data collection and data analysis methods; present the key data sources; discuss the sampling methods and details; summarise the midterm review methodology in a midterm planning matrix)
 - Work plan (develop a timeline; specify persons involved for each phase)
 - Logistics
 - Budget
 - Appendix (include draft data collection instruments for review; etc.)
- **1 x MTR validation workshop** with staff. Consultants need to submit a **brief 3-4 MTR validation workshop report**, outlining the workshop content and including photographs and signed attendance registers for each day.
- **1 x MTR report**, with the following sections:
 - Executive summary
 - Background to FABIO’s strategy
 - Background of the MTR
 - Approach and Methodology
 - Findings (please note the findings should be presented against baseline data. Where no baseline data was available, the consultant should draw on retrospective baseline gathered, where possible, during data collection)
 - Lessons and recommendations
 - Annexures, as relevant, but also including:
 - **1 x ToC workshop** covering both Programme and OD
 - **Finalised ToC diagram**, and **list of indicators** for output, outcome, strategic objectives and any assumptions in the ToC – for both FABIO’s development programme *and* own organizational development.

The MEL and OD Consultants will have different focus during the MTR, with the OD consultant focusing on OD, and the MEL consultant focusing on Programme, however the pair will need to work closely together throughout. Please see below for a breakdown of how FABIO and All We Can envisage each Consultant focus:

OD Consultant	MEL Consultant
Kick off call	Kick off call
Desk review of documents (OD)	Desk review of documents (programme)
Develop methodology and research framework (OD)	Develop methodology and research framework (Programme)
Data collection:	Data collection:

<ul style="list-style-type: none"> - Govt., other partners, NGOs etc (done together with MEL consultant?) - Org. Assessment with FABIO staff - SWOT / PESTLE analysis - (Include in this data collection, gathering baseline data where possible, and needed) - 	<ul style="list-style-type: none"> - Govt., other partners, NGOs etc (done together with OD consultant?) - Community members participating in FABIO programme - SWOT / PESTLE analysis - (Include in this data collection, gathering baseline data where possible, and needed)
Co-facilitate MTR Validation workshop with FABIO staff	Co-facilitate MTR Validation workshop with FABIO staff
Co-Draft MTR Report, including: <ul style="list-style-type: none"> - Extent to which OD objectives, outcomes and outputs are being achieved - Internal and external context analysis - Assessment of the 1) relevant 2) coherence 3) efficiency and 4) sustainability of FABIO's OD, and factors likely to influence this for remaining strategic period 	Co-Draft MTR Report, including: <ul style="list-style-type: none"> - Extent to which programme objectives, outcomes and outputs are being achieved - Internal and external context analysis - Assessment of the 1) relevant 2) coherence 3) efficiency and 4) sustainability of FABIO's programme, and factors likely to influence this for remaining strategic period
MEL Framework workshop (OD aspects: <ul style="list-style-type: none"> - Verify OD outcomes, outputs, activities and assumptions in the ToC (and make necessary changes) - Identify 'organisational milestones for FABIO journey to organisational resilience' (10-15 year outcomes) - Identify any indicators needed to measure OD over the remainder of the strategy - 	MEL Framework workshop (Programme aspects: <ul style="list-style-type: none"> - Verify programme outcomes, outputs, activities and assumptions in the ToC (and make necessary changes) - Identify any indicators needed to measure Programme over the remainder of the strategy - Support articulation of organisational resilience outcomes and indicators – these should be longer term (10-15 years)
Catch up meetings during the process above, as needed	Catch up meetings during the process above, as needed

3.2) Inputs to be provided to Consultants by the Partners and All We Can:

Partners:

- Strategic Plans
- OA report / assessment
- OD Plan (if available)
- 6, 10 and 12-month partner reports for the previous years of the strategic period + Humanitarian Aid reports (for HA projects delivered by the partner alongside their long-term development Programme)
- Existing MEL framework (ToC and measurement plan), data collection etc. (where available)

All We Can:

- Capacity Development Framework

4. APPLICATION

Consultants are asked to outline a proposed methodology for the MTR, workshops and the subsequent participatory development of the deliverables. It is essential that the deliverables of the assignment are ones that are fully owned by FABIO's team. Consultants should clearly showcase how they will create this sense of ownership through the process of the assignment.

Given the ongoing COVID19 pandemic and ongoing threat of natural disasters in many of the focus countries All We Can's partners operate in, Consultants should outline in the proposals, how they will mitigate any challenges arising from sudden crises, changing national lockdowns etc., and what contingency plans they will have in case travel to partner offices and communities becomes impossible.

5. CONDITIONS AND DETAILS OF THE ASSIGNMENT

5.1) Duration and Budget

The assignment is intended to be carried out between **August and October 2021**. It is not anticipated that Consultants will need to work on the assignment full time during this period. It is anticipated a total of 15 (max 20) days would be required for the assignment in total but this can be negotiated within the parameters of the assignment.

The available budget for this assignment is **£4500 including both consultant fees, logistics accommodation, travel and transport for the consultant**.

5.2) Location

FABIO is based in Jinja. We seek a consultant based in-country. Given the ongoing COVID19 pandemic preference will be given to consultants who are able to easily and safely access these locations – and if not possible how the scope of work will be achieved if the Consultant is forced to do the process remotely.

5.3) Fee Disbursement Schedule

As full consideration for the services performed by the Consultant under the terms of Contract of

Services, shall pay the Consultant the total offered, verified, and accepted amount upon certification by the Partners and All We Can that the services have been satisfactorily performed and deliverables have been approved.

Installment of Fee payment	Deliverables or Documents to be Delivered	Timeline	% of Fee paid
1st Installment	<ul style="list-style-type: none">Inception Report + check in call with FABIO and All We Can to present methodology laid out in the inception report	By 2 weeks after the contract is signed	35%

2 nd Installment	<ul style="list-style-type: none"> • MTR research, data collection/field work completed • MTR validation workshop completed + report submitted • Check in call with FABIO and All We Can to discuss outcome of MTR validation workshop and for consultant to present the draft report • Draft MTR report submitted for comment 	By 5 weeks after the 1st installment and upon submission and approval of the MTR validation workshop report	30%
3 rd Installment	<ul style="list-style-type: none"> • ToC Workshop completed • ToC diagram and indicators submitted • Check in call to discuss any feedback and comments FABIO and All We Can have on the MTR report • Final version of the MTR report submitted and approved 	By 3 weeks after the 2 nd installment and completion of the MTR workshop and submission and approval of the MTR report	35%

- Total offered amount is expected to cover travel costs, communication costs, costs of typing and preparing the soft and hard copies of required documents and any other relevant costs regarding this activity
- All envisaged travel and related costs (including insurance, accommodation, transportation, etc.) must be included in the Consultants financial proposal. Please note, travel insurance must be included in the proposal budget.
- Each payment will be made in the Consultants preferred currency within at least of two weeks of All We Can receiving an invoice from the Consultant. All We Can’s final approval of the relevant deliverable, is a pre-requisite for verification and releasing each payment.
- Each payment will be transferred through Electronic Fund Transfer to the account number of the Consultant as provided by them in the Contract of Services, indicating full banking information.
- The Contractor shall not do any work, provide any equipment, materials and supplies or perform any other services which may result in any cost in excess of the agreed and approved budget in the inception report, without prior approval from All We Can.
- The Consultant will also be required to sign and adhere to All We Can safeguarding policy and code of conduct.

5.4) Consultant Qualification and Competencies

We seek a team of two consultants to work together Consultants will be responsible for facilitating a participatory MTR process, that includes a review of both OD and development programme elements of FABIO’s Strategic Plan; as well as a ‘forward looking’ exercise to update FABIO’s MEL Framework, and facilitate FABIO to articulate resilience milestones for their organisaitional development. Consultants who can demonstrate experience working on organizational change or OD processes, as well as experience in MEL – specifically using a theory of change approach, designing and implementing MTRs or similar types of exercises like evaluations, and carrying out participatory data collection and analysis, will be preferred. Based on this the following qualifications and competencies are required:

Required

- Minimum of 3-6 years' experience working in poverty alleviation, livelihoods, and/or sustainable development programmes and/or organizational change processes.
- MEL experience using theory of change process, and carrying out midterm reviews and evaluations
- Experiencing facilitating organisational change processes; organisational development (OD)
- Experience using participatory approaches and facilitating ownership
- Ability to take make complex, technical MEL and OD theory and processes accessible for others
- Commitment to uphold best practices around safeguarding and privacy in line with All We Can and FABIO's policies, and willingness to adhere to All We Can safeguarding and other relevant code of conduct behaviour policies.

Preferred

- Strong understanding of international development, specifically the thematic areas FABIO works in.
- Highly developed self-management, and communication skills

5.5) Guiding Principles and Values

Consultants are required to adhere to All We Can Code of conduct, Child Safeguarding practices and confidentiality when engaging partner and (if applicable) community programme participants. Consultants, when photographing partner staff and/or programme participants (if applicable) will obtain consent from individuals using All We Can's consent forms and provide these written consent forms to All We Can as annexures to reports. Inclusion is a core value for All We Can and Consultants will therefore need to ensure that all partner staff/community programme participants are included in discussions, and are able to have their voices heard, regardless of their job titles/positions in the community. The Consultant will also need to familiarize themselves with All We Can's Ethical Content Gathering Framework for data collection in the field.

5.6) Selection Process

All We Can and FABIO will use internal guidance, checklists and an interview process to select the successful consultant team. The guidelines require the consultant to submit, a proposal explaining, their comprehension of the ToR, and how they would approach this assignment, with a summary of their proposed methodology, especially in terms of how they plan to meet the objectives in the timeframe outlined above. This proposal should include the CV of the Consultant(s), including relevant experience, a detailed budget and time availability.

Interviews with shortlisted consultants will take place the week of 16th-20th /August/ 2021 via Zoom.

6. APPLICATION PROCESS

Interested consultants are requested to submit a proposal, no longer than 10 pages, covering both technical and financial areas, and should include the following:

- A technical proposal explaining, their comprehension of the, ToR, and how they would approach this assignment, summarising, the proposed methodology for the workshops and participatory approaches they plan to use to ensure partner ownership of the deliverables, including a timeline. This should also include an overview of the possible risks to delivering the assignment and efforts to mitigate these risks, specifically any challenges that might arise from COVID19 and potential travel restrictions that might not permit face to face engagement with the partners.
- Detailed work plan or schedule for the assignment with breakdown of activities and timeline indicating their availability in terms of the outlined timelines in this ToR.
- Financial quotation or proposed budget in local currency (inclusive of VAT) which should outline expected fees, travel and transport, meals accommodation (where required) and life insurance (mandatory). In their proposal, candidates should consider that the budget, would, cover approximately 14 days with a maximum budget of £3500 all inclusive, available for this assignment.
- A brief, single paragraph bio that can be shared publicly about the consultants' background and experience, should the application be successful.

In addition, please provide the following with your quotation:

- Copies of all relevant Curriculum Vitae (CVs)
- Contact details of two professional references (including one from a previous client)

Quotations/proposals must be submitted by close of business **on 13 August 2021** to knajjiba@gmail.com and d.kalete@allwecan.org.uk. For additional clarification and queries about the terms of reference, please email Veronica Fletcher at v.fletcher@allwecan.org.uk

Proprietary Right

All data, report(s), findings and other information arising from or generated because of this evaluation are and shall remain the sole property of All We Can and FABIO. No use shall be made of this information in any way whatsoever nor shall any report or portion of any reports, or any data, findings or other information be reproduced except with the prior written permission of All We Can and FABIO.

Data Protection

All We Can will use personal data provided (e.g. contact details, information about experience, qualifications and competencies) for the purposes of processing the application. This is a necessary step as part of the process of entering into a contract to carry out this evaluation. The full application will be shared with All We Can staff, and the 'bio' paragraph submitted by interested consultants, may be shared publicly once Consultant section process is complete. All We Can will retain applications as necessary to comply with audit requirements and to the extent required by law, however these will be stored on a secure server.