

Terms of Reference

Short-Term Consultancy for Fundraising and Resource Mobilization Strategy

1 Introduction

1.1 About ForumCiv

ForumCiv is Sweden's largest civil society platform, with over 160 member organizations and a presence in Sweden, Colombia, Liberia, Kenya, and Lithuania. Since 1995, ForumCiv has supported civil society actors globally to enable people to organize, claim their rights, and drive sustainable change.

- **Our vision:** A just and sustainable world where all people have the power to effect change.
- **Our purpose:** To empower people living in marginalization, who organize to claim their rights and advocate for change that contributes to a just and sustainable world

The Roles of ForumCiv are:

- (1) To empower people who organize to demand their human rights, all over the world. This is done primarily through financial support to member organizations and their partner organizations, as well as through access to capacity development for everyone who works within the member and partner organizations, and ForumCiv.
- (2) To spread knowledge and encourage commitment to changes that contribute to a just and sustainable world. This is done in collaboration between ForumCiv and the member organizations and focuses on both decision-makers and the general public, primarily in Sweden and the EU.

ForumCiv office in Kenya serves as the regional office for Eastern and Southern Africa (ESA), coordinating sub-granting in the region and developing new partnerships, innovative programmes, and local engagement with donors. Most of the region's interventions focus on civil society strengthening and deepening democracy, human rights, and gender equality. The office works with a broad range of partners and stakeholders at grassroots, national, regional, and global levels.

1.2 Context and background to the assignment

ForumCiv's Regional Office for Eastern and Southern Africa (ROESA) is entering a new strategic phase guided by its Regional Strategy 2026–2030, which envisions ROESA as

a high-performing, accountable, and learning-driven regional hub. The strategic plan prioritizes strengthening the organization's institutional backbone to effectively respond to emerging civic space challenges, shifting donor landscapes, and the increasing complexity of development and human rights work in the region.

The strategy is anchored around three interlinked focus areas:

- **Operational Excellence and Accountability** – Strengthening governance, compliance, financial management, monitoring and evaluation systems to ensure transparency, integrity, and donor confidence.
- **People and Culture** – Investing in staff capacity, wellbeing, diversity, equity, and resilience to sustain a motivated and values-driven workforce.
- **Thought Leadership and Partnerships** – Positioning ForumCiv as a regional convener and knowledge leader on democracy, human rights, gender justice, climate justice, and innovative civic engagement.

In line with these priorities, ForumCiv is implementing the Organisational Effectiveness Programme. This programme acts as an organisational boost aimed at addressing key internal capacity gaps in areas such as strategic alignment, staff development, partnerships, fundraising, and institutional resilience.

The OE initiative recognises that ForumCiv's ability to deliver transformative programming across Eastern and Southern Africa depends not only on strong external interventions but also on robust internal systems and sustainable organisational capacities. Strengthening internal fundraising and resource mobilisation is therefore a critical component of ensuring long-term impact and sustainability.

1.3 Programme description

The Organisational Effectiveness Programme will enable ForumCiv ROESA to build internal organisational capacity in strategic areas essential for achieving its Regional Strategy 2026–2030.

ForumCiv operates in a context characterised by shrinking civic space, increasing digital threats, economic pressures, and psychosocial stress affecting civil society actors. As a key regional actor, ForumCiv must remain resilient, agile, and strategically aligned to continue advancing democracy, human rights, gender justice, and climate justice across the region.

The regional office has identified the need to strengthen its capacity in several interconnected areas, including:

- Staff development, wellness, and resilience
- Strategy finalisation, alignment, and dissemination
- Partnerships, collaboration, and regional convening
- Fundraising and resource mobilisation sustainability
- Digital safety and organisational security

With support from the OE programme, ForumCiv will address these gaps through targeted capacity-building processes, including the development of an updated fundraising strategy aligned with evolving donor priorities and the regional strategic direction. This will enable the office to function more effectively as a sustainable regional hub, better equipped to serve communities and partners working to protect democratic space and human rights.

2 Assignment

2.1 Assignment purpose, aim and objectives

The purpose of this consultancy is to strengthen ForumCiv ROESA's fundraising capacity through the development of a comprehensive Regional Fundraising and Resource Mobilisation Strategy aligned with the ROESA Strategy 2026–2030.

Specific objectives are to:

- Review and align fundraising priorities with the Regional Strategy
- Conduct an institutional fundraising capacity assessment
- Develop a structured and diversified fundraising strategy
- Develop practical fundraising tools and systems
- Strengthen staff capacity in proposal development and donor engagement

2.2 Scope, Focus and limitations

The consultant shall:

- Review the ROESA Strategic Plan 2026–2030
- Conduct a fundraising capacity and SWOT analysis
- Assess existing donor engagement practices
- Develop a Regional Fundraising and Resource Mobilisation Strategy
- Develop donor mapping tools, proposal templates, and tracking systems
- Propose KPIs and an implementation roadmap

Special issues to be addressed:

- Alignment with emerging donor trends
- Sustainability beyond project-based funding
- Institutional ownership and internal capacity building

3 Methodology

3.1 Methodology

To effectively deliver this assignment, the consultant is expected to adopt a participatory organisational effectiveness approach. The methodology will include:

1. Preliminary Institutional Assessment
 - Review existing fundraising policies, strategies and resource mobilisation practices
 - Conduct key informant interviews with ROESA leadership and staff
 - Carry out a SWOT analysis of the fundraising function
2. Fundraising Capacity Assessment
 - Develop an assessment framework tailored to ROESA's fundraising needs
 - Collect data through surveys, interviews, and document review
 - Identify organisational gaps and opportunities for fundraising improvement
3. *Development of a Capacity Improvement Plan*
 - Define priority fundraising capacity areas
 - Set objectives, responsibilities, timelines and implementation steps
 - Ensure alignment with the Regional Strategy 2026–2030
4. *Fundraising Strategy and Tools Development*
 - Develop a regional fundraising strategy aligned with donor trends and thematic priorities
 - Create practical templates (donor profiles, proposal templates, tracking systems)
5. *Monitoring, Evaluation and Learning*
 - Develop KPIs to track implementation progress
 - Provide recommendations for long-term sustainability and learning

This methodology may be further refined during the inception meeting in collaboration with the ROESA reference group.

3.2 Reference Group/ForumCiv Support

ForumCiv will provide the following.

- Provide an approved detailed Terms of Reference.
- Relevant literature for desktop review includes and is not limited to ForumCiv Strategic Plan 2026-2030 among other relevant policies.
- Provide key contact and linkage to the relevant team/s.

4 Outputs and Reporting

4.1 Outputs

The following outputs must be submitted by the contractual party and received to the satisfaction of ForumCiv:

- Inception Plan: Detailed Work plan to be submitted **5 (five) days** after signing the contract.
- Reviewed ForumCiv ROESA Strategic Plan;
- Fundraising Strategy. Deadline;
- Final Report of the Consultancy: Deadline June

Approval of outputs: Deliverables will be approved by the Regional Manager; the period for approval of reports will be 10 days, if after this time the Manager does not issue any observations, the report will be considered approved.

4.2 Reporting

The reports shall be written in English. The Consultant shall submit one written copy as well as one electronic version of each version.

The reports shall be short and with clear appendices.

5 Time scope

ForumCiv has estimated that the volume of the assignment amounts to a total of 20 working days spanning over 2 months. The total scope of work will be aligned in consultancy with the winning tenderer accordingly.

The assignment shall be undertaken between **2026-04-28** and **2026-06-30**.

6 Budget

The budget should not exceed KES 1,500,000.00 including fees and reimbursable and all taxes including VAT.

The following payments will be made according to the schedule below:

- ⇒ 40% after the contract is signed and the work plan approved.
- ⇒ 30 % after the delivery and approval of the draft report.
- ⇒ 30 % after the delivery and approval of the final report

6.1 Fees

The tenderer shall specify the fee per working day including all taxes and social costs but including all applicable taxes and VAT.

6.2 Reimbursable

The tenderer is to specify anticipated reimbursable costs. If per-diem costs are included, they shall be specified separately and follow the thresholds from the Swedish Tax Agency (or equivalent). The details of the budget for reimbursable costs shall be indicative only. Revisions and re-allocations will be decided in a dialogue with ForumCiv, along the course of work.

7 Tenderer's qualifications

Diversity: ForumCiv is committed to diversity and inclusion and equal opportunity for all candidates.

The tenderer is to meet the following expectations;

- Offer services described in §2 above.
- **Degree/Academic Level & Years of Professional Experience:** Professional with a master's degree in program development or equivalent with at least 10 years' experience in fund development.
- Languages: English and Kiswahili.
- **Areas of Expertise:** Fund raising and resource mobilisation; Proposal writing and grants management; Strategic planning; Relationship building and networking; Research and data analysis; Project management; Communication and facilitation; and experience in working with international organizations in the development sector.
- **Skills:** Ability to work with little supervision
- Environmentally sustainable development shall be taken into consideration and goods/services shall be produced and supplied in the most environmentally friendly way possible.
- Basic human rights as expressed in the ILO's core conventions¹, shall be given due consideration.
- Not be bankrupt, be convicted of a crime in the profession, not have been guilty of serious professional misconduct nor have tax liabilities. Swedish suppliers shall have a class F tax certificate for contractors.
- The tenderer follows ForumCiv's Code of Conduct (provided at contract signing).
- The tenderer must make sure that subcontractors if any, follow the same expectations.

¹ Freedom of Association and Protection of the Right to Organize Convention, (No. 87 and 98), Forced Labour Convention, (No. 29 and 105), Minimum Age Convention, (No. 138 and 182), Equal Remuneration Convention, (No. 100 and 111)

Note: The qualifications stated hereinafter reflect the requirements for an individual consultant. For a highly complex operation with multiple programme sites, components and increased risk, a team of consultants may need to be hired.

8 Procurement technicalities

8.1 Tender Procedure

The assignment is subject to an **open** tender procedure, handled directly by a ForumCiv assessment group. The tenders will be assessed considering the following aspects;

- The contents of the tender (that all the required information is enclosed)
- The qualifications and experience of the tenderer
- Experience from working with relevant stakeholders in Kenya.
- The methodology and approach proposed
- The cost for the tender

Questions concerning the tender can be posed to the contact persons indicated below until **10th April 2026**. ForumCiv reserves the right not to accept any of the tenders submitted. In addition, ForumCiv reserves the right to take references for the proposed candidate.

ForumCiv is not covered by the Swedish Public Procurement Act (LOU) nor the Kenyan Procurement and Disposal Act. This means that it is not possible to appeal against the decision of choosing a supplier and that ForumCiv is not obliged to disclose the procurement documentation after completion of procurement.

8.2 Documentation and information required

Tenders shall

- State the methods they intend to use to implement the assignment and guarantee the quality of their work.
- State the qualifications of each of the persons/sub-consultants they make available for the assignment and attach a CV for each of them.
- Confirm that they will be able to meet all expectations in §7.
- State the total cost of the assignment, specified in the form of the hourly fee for each personnel category, reimbursable costs, and any other costs and possible discounts. All costs shall be given in Kenya Shillings (KES), including VAT.
- Propose a schedule for the assignment.

Based on the above, interested parties will be evaluated in the following criteria

Assessment Criteria

| Criteria | Maximum Points |
|--|-----------------------|
| <i>Detailed Technical proposal with the consultants' profile and capability statement and interpretation of the Terms of Reference</i> | 50 |
| <i>Experience in undertaking similar work in the last five years</i> | 20 |

| | |
|---|------------|
| <i>The proposed methodology, detailed implementation plan, and time frame</i> | 30 |
| <i>Total</i> | 100 |

8.3 Final date of Submission

Application documents should be sent to procurement.kenya@forumciv.org with the subject heading: Short Term Consultancy for – **Fundraising Consultancy** . The deadline for submission is **14th April 2026**.

8.4 Validity of the Tender

Tenders shall remain valid for 60 days.

9 Contact data

For further information, kindly contact; procurement.kenya@forumciv.org