TERMS OF REFERENCE

Development of a Training Manual on Safeguarding, Accountability, MEAL and Program Quality

Item	Detail
Assignment title	Development of a Training Manual on Safeguarding, Accountability, MEAL and Program Quality
Contracting organization	Civil Society Resource Center (CSRC)
Type of contract	Individual consultant or consultancy firm, lump sum
Duration	Indicatively 35 working days from contract signature, subject to Section 4.1
Deadline for applications	23 Nov 2024

1. Background

The EU Civil Society Fund Plus is a four year action financed by the European Union and implemented by Christian Aid in partnership with three co-applicants: the Civil Society Resource Center (CSRC), the Ethiopian Civil Society Organizations Forum (ECSF) and the Chura Abugida Artistic Association (CAAA). The programme operates in Tigray, South Ethiopia, Central Ethiopia and Addis Ababa City Administration, and provides sub-grants together with sustained capacity strengthening to sixty civil society organizations.

2. Rationale for the Assignment

The capacity assessments identified a consistent pattern across all four regions in which safeguarding and accountability exist in policy but not in practice. Organizations were found to hold safeguarding policies without corresponding staff awareness, without assigned focal points and without functioning referral pathways. Community feedback and complaints mechanisms were weak or entirely absent, with several assessed organizations having no accessible channel through which the communities they serve can raise a concern. Monitoring and evaluation was found to be fragmented and project based rather than institutionalized, with an absence of organizational frameworks and tools, weak reporting and learning systems, limited staff capacity in monitoring practice, and limited use of data and learning to adapt delivery. Programme cycle processes were found to be weakly institutionalized, and sustainability considerations were rarely integrated into programme design or documented.

These findings are treated as one subject rather than several. Accountability to affected communities is exercised through feedback and complaints mechanisms, which are also the channel through which safeguarding concerns reach an organization, and both depend on monitoring systems that can capture, track and act on what is reported. Gender equality and social inclusion determines who is able to use those channels and who is reached by programmes in the first place. Programme quality and programme cycle management provide the structure into which all of this is embedded. Developing these as separate manuals would produce overlapping and possibly inconsistent guidance on the same organizational systems, which is why they are combined into a single assignment.

3. Objective of the Assignment

The overall objective is to develop one integrated training manual, with accompanying facilitation and cascade materials, covering safeguarding, accountability to affected communities, monitoring, evaluation, accountability and learning, gender equality and social inclusion, and programme quality and programme cycle management, suitable for delivery to programme and management staff of Ethiopian civil society organizations of varying size and maturity.

The specific objectives are as follows.

- To adapt the existing material referred to in Section 4.1 into the common structure of the programme manuals library, and to contextualize it for Ethiopian civil society organizations receiving sub-grants.
- To develop new content on safeguarding practice, community feedback and response mechanisms, and monitoring, evaluation, accountability and learning systems, which is not covered by any existing material available to the consortium.
- To move safeguarding and accountability from written policy into operating practice, by equipping organizations with focal point arrangements, reporting channels, referral pathways and response procedures.
- To equip participants with practical instruments, including model policies, frameworks, formats and registers, that can be adopted and adapted by their organizations immediately after training.
- To enable trained staff to cascade the content internally to colleagues who did not attend the training, using a simplified facilitation package.

4. Scope of Work

4.1 Relationship to Existing Material and Adjustment of Scope

This assignment is scoped on the basis that existing material on programme quality and on gender equality and social inclusion, held within the consortium, will be made available to the selected consultant at contract signature for adaptation. The consultant is not expected to develop that content from first principles, but is expected to restructure it into the common format of the manuals library, contextualize it for Ethiopian civil society organizations, and integrate it with the new content described in Sections 4.2 and 4.3.

4.2 Module 1: Safeguarding, Accountability and Community Feedback

Objective: to move safeguarding and accountability from policy to practice through assigned focal points, functioning feedback and complaints mechanisms, and clear response procedures. This module is new content and is to be developed in full. Indicative content includes the scope of safeguarding as it applies to civil society organizations, covering children, adults at risk, programme participants, staff and volunteers; the prevention of sexual exploitation, abuse and harassment; the code of conduct and its practical application; safer recruitment and vetting; the role, selection, mandate and limits of the safeguarding focal point; risk assessment of programme activities from a safeguarding perspective; the design of accessible and safe reporting channels, including consideration of literacy, language, disability, distance and gender in channel design; the receipt, recording and handling of a concern; the principles of a survivor centred response, including confidentiality, informed consent, safety and non-discrimination; referral pathways to health, psychosocial, legal and protection services and how an organization maps them in its own operating area; investigation and its limits, including when a matter must be referred rather than handled internally; reporting obligations toward donors and

regulators; accountability to affected communities as a broader practice, covering information sharing, participation and the closing of the feedback loop; and the distinction between a safeguarding concern, a programme complaint and a staff grievance, together with the routing of each. Practical instruments to be produced include a model safeguarding policy, a code of conduct, a focal point terms of reference, a safeguarding risk assessment format, a community feedback and response mechanism policy and procedure, a complaints register and case tracking format, a referral pathway mapping template and a feedback loop reporting format.

The consultant shall note that the assessments identified the absence of community feedback and response mechanisms as one of the sharpest and most consistent gaps in the cohort, and CSRC therefore requires this content to be developed to a standard that allows an organization with no existing mechanism to establish one directly from the manual.

4.3 Module 2: Monitoring, Evaluation, Accountability and Learning

Objective: to institutionalize monitoring systems that generate usable evidence and inform decision making. This module is new content and is to be developed in full. Indicative content includes the elements of an organizational monitoring, evaluation, accountability and learning framework as distinct from project level arrangements; the theory of change and results chain; indicator definition, including the construction of indicator reference sheets and the distinction between output, outcome and impact level measurement; baselines, targets and means of verification; data collection methods and tools, both quantitative and qualitative; sampling in small scale settings; data quality assurance and verification; responsible data management, including consent, storage and the protection of personal data of programme participants, cross referenced to the data protection content held in another manual of this library; data analysis and interpretation for non-specialists; reporting to management, boards and donors; evaluation types and when each is appropriate; learning processes including after action review, reflection sessions and the documentation of lessons; and the use of monitoring evidence for adaptive management rather than for reporting alone. Practical instruments to be produced include a monitoring framework template, an indicator reference sheet format, a data collection plan, data quality assurance checklists, a learning log format and a management reporting template.

4.4 Module 3: Gender Equality and Social Inclusion

Objective: to embed gender and inclusion across governance structures, programming and organizational practice. This module is to be adapted from the existing material referred to in Section 4.1. Indicative content includes concepts and terminology; gender and inclusion analysis and its application in programme design; disability inclusion and accessibility in programme delivery and in organizational practice; inclusion of young people and of other groups marginalized in the operating context; gender responsive budgeting in outline, cross referenced to the financial manual of this library; the collection and use of disaggregated data; inclusive participation and consultation; and the organizational dimension, covering representation in governance and staffing, workplace culture and non-discrimination. The adapted content shall be aligned with the safeguarding and accountability content in Module 1, particularly on accessible reporting channels and on the design of feedback mechanisms usable by women, by people with disabilities and by other groups facing barriers to access.

4.5 Module 4: Programme Quality and Programme Cycle Management

Objective: to institutionalize programme cycle processes and quality standards so that delivery is consistent rather than project by project. This module is to be adapted from the existing material referred to in Section 4.1. Indicative content includes the programme cycle from assessment and design through planning, implementation, monitoring, review and closure; participatory needs assessment; problem analysis and intervention logic; work planning and the integration of budget and activity plans; implementation oversight and course correction; quality standards and how an organization defines and monitors them; documentation and knowledge management across the cycle; project closure, handover and exit; and the integration of sustainability considerations into design rather than their treatment at closure. The adapted content shall be aligned with Module 2 so that monitoring arrangements are presented as part of the programme cycle rather than as a parallel system.

4.6 Cross-Cutting Requirements

Across all four modules the consultant shall calibrate content for organizations at different levels of maturity, since the grantee cohort ranges from established organizations with functioning systems to newly formed and non-networked organizations that lack basic instruments. The consultant shall indicate, for each module, which content constitutes the foundational entry point and which is intended for organizations that have those foundations in place. Content shall reflect the Ethiopian legal and service environment, particularly in the mapping of referral pathways, which shall be presented as a method an organization applies in its own locality rather than as a fixed national list.

The consultant shall exercise particular care in the treatment of safeguarding material. The manual shall not include case material describing actual incidents in a manner capable of identifying any person or organization, shall not present investigation techniques that would encourage untrained staff to undertake investigations they are not competent to conduct, and shall consistently direct participants toward referral where a matter exceeds the organization capacity to respond. Facilitation notes shall include guidance for facilitators on managing disclosures that may arise during training sessions.

5. Methodology

The consultant shall propose the methodology in the technical offer. At minimum the assignment is expected to include a review of programme documentation, comprising the consolidated capacity assessment findings, the regional capacity strengthening plans, the approved curriculum design and the existing material referred to in Section 4.1; consultation with CSRC and with regional leads to confirm content emphasis; drafting; participation in a validation session with CSRC, Christian Aid and regional leads; and revision of the draft in response to written consolidated comments.

6. Deliverables and Indicative Schedule

All deliverables shall be submitted in English, in editable Microsoft Word format, with formats and registers supplied in editable form and any presentation files in editable format. Working days below are indicative and may be adjusted in the technical offer with justification.

No.	Deliverable	Description	Indicative Timing	Days
1	Inception report	Understanding of the assignment, refined methodology, assessment of the usability of the	Within 7 days of contract signature	4

No.	Deliverable	Description	Indicative Timing	Days
		existing material, annotated outline by module, list of practical instruments to be produced, and work plan		
2	First draft manual	Complete draft covering all four modules, including the practical instruments listed under each module in Section 4	Within 24 days of contract signature	18
3	Facilitator guide	Session plans, timing, facilitation notes including guidance on managing disclosures, exercises, case material drawn from the Ethiopian civil society context, and pre and post training assessment instruments	Submitted with deliverable 2	5
4	Cascade training toolkit	Simplified short form package enabling a trained participant to deliver the essential content internally to colleagues, comprising slides, handouts and brief facilitator notes per module	Submitted with deliverable 2	3
5	Validation session	Presentation of the draft to CSRC, Christian Aid and regional leads, and documented response to comments raised	Within 31 days of contract signature	2
6	Final manual and accompanying materials	Final versions of deliverables 2, 3 and 4 incorporating consolidated written comments, formatted and ready for use	Within 35 days of contract signature	3

7. Quality and Format Standards

The manual shall meet the standards applying to every manual in the programme library, so that training delivered in different regions is comparable.

- It shall follow the common structure used across the library: module objective, learning outcomes, content, exercises, practical instruments, and assessment or verification tools.
- Content shall be practice oriented and expressed in plain language, favouring policies, formats and worked examples over extended theoretical exposition.
- Safeguarding and accountability content shall be written so that an organization holding no existing policy or mechanism can establish one directly from the manual.
- Each substantive content section shall be traceable to the capacity area it addresses, so that responsiveness to the assessment findings can be verified at review stage.
- Examples and case material shall be drawn from the Ethiopian civil society operating context, shall not identify any grantee organization, and shall not describe any actual safeguarding incident.
- Adapted material shall be clearly integrated into the manual rather than appended, and any third party material reproduced shall be free of licensing restriction or accompanied by written permission.

8. Qualifications and Experience

The assignment may be undertaken by an individual consultant or by a firm deploying a small team. Given the breadth of the package, bidders are encouraged to propose a team combining safeguarding and monitoring expertise. Where a firm applies, the lead expert shall meet the requirements below and the composition of the team shall demonstrate coverage of all four modules.

- An advanced degree in social sciences, development studies, social work, law, public health or a related field.
- At least eight years of professional experience in safeguarding, protection, accountability to affected populations, or monitoring and evaluation, of which a substantial part in the non-governmental sector.
- Demonstrated experience in developing safeguarding policies or community feedback and response mechanisms for operational organizations, with samples of previous work to be submitted.
- Demonstrated experience in designing organizational monitoring, evaluation, accountability and learning frameworks, or the inclusion of an associate expert covering this area.
- Demonstrated competence in gender equality and social inclusion, including disability inclusion.
- Knowledge of the Ethiopian legal and service environment relevant to referral of protection concerns.
- Demonstrated understanding of survivor centred principles and of the ethical handling of sensitive material.
- Excellent written English. Working knowledge of Amharic is an advantage.

9. Payment

The contract shall be a lump sum against deliverables. Payment shall be made in Ethiopian Birr, subject to applicable withholding tax and any other statutory deduction, on the following schedule.

Instalment	**Trigger**	**Proportion**
First	Approval of the inception report	20 per cent
Second	Approval of the first draft manual, facilitator guide andcascade toolkit	40 per cent
Third	Approval of the final manual and accompanying materials	40 per cent

10. Ownership, Confidentiality and Conduct

All materials produced under this assignment shall be the property of CSRC and of the EU CSF Plus programme, and may be reproduced, adapted, translated and distributed by the consortium without further payment to the consultant. Existing material provided for adaptation remains the property of its originating organization and shall be used solely for the purposes of this assignment. The consultant shall not publish or otherwise use any material arising from this assignment without the prior written consent of CSRC. Assessment findings and any organizational information relating to

individual grantees that the consultant may access are confidential and shall not be disclosed, reproduced or referred to in any other work.

The selected consultant shall sign the code of conduct and the safeguarding policy of CSRC before commencing the assignment, and shall comply with them throughout. Should any safeguarding concern come to the attention of the consultant during the assignment, it shall be reported immediately to the designated focal person at CSRC and shall not be pursued by the consultant.

11. Evaluation of Offers

Offers shall be evaluated on a combined technical and financial basis, weighted seventy per cent technical and thirty per cent financial. Only offers achieving a technical score of seventy out of one hundred or above shall proceed to financial evaluation.

Criterion	**Points**
Qualifications and relevant experience of the lead expert and, where applicable, the team	20
Demonstrated experience in developing safeguarding policies and community feedback and response mechanisms, assessed on the samples submitted	25
Demonstrated experience in designing organizational monitoring, evaluation, accountability and learning frameworks	20
Understanding of the assignment, quality of the proposed methodology and annotated outline	25
Realism of the work plan and the allocation of working days	10
Total technical score	100

CSRC reserves the right to accept or reject any offer, to annul the process, or to negotiate the scope and the level of effort with the selected consultant prior to contracting, without incurring liability toward applicants.