TERMS OF REFERENCE

Development of a Training Manual on Evidence-Based Policy Analysis, Advocacy and Communication and Delivering Training for Subgrantees

Item	Detail
Assignment title	Development of a Training Manual on Evidence-Based Policy Analysis, Advocacy and Communication
Contracting organization	Civil Society Resource Center (CSRC)
Type of contract	Individual consultant or consultancy firm, lump sum
Duration	Indicatively 30 working days from contract signature, subject to Section 4.1
Deadline for applications	TBD

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 found limited technical capacity in evidence-based policy analysis, dialogue and advocacy among grantee organizations, together with underdeveloped advocacy strategy and a weak unified voice on issues affecting the sectors and communities they serve. Organizations were found to engage in advocacy without a documented strategy, without systematic analysis of the actors whose decisions they seek to influence, and without a reliable method of converting the information they generate through their programmes into material capable of informing policy.

The assessments also found limited systematic monitoring of the operating context to inform programming and risk management, with no established process for periodic conflict, stakeholder and risk assessment. This finding sits in the technical track because context analysis is the foundation on which both programme decisions and advocacy positioning rest.

3. Objective of the Assignment

The overall objective is to develop one integrated training manual, with accompanying facilitation and cascade materials, covering evidence based policy analysis and advocacy, stakeholder, power and context analysis, and media engagement and public communication, suitable for delivery to programme staff of Ethiopian civil society organizations engaged in policy dialogue and advocacy.

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 operating at local, regional and federal level.
- To develop the practical skills layer that the existing material does not provide, covering stakeholder mapping, power analysis, context analysis, the translation of evidence into policy influencing material, and media engagement.
- To enable participants to develop, document and implement an organizational advocacy strategy rather than to conduct advocacy on an occasional and reactive basis.
- To equip participants with practical instruments, including analysis tools, planning formats and drafting templates, that can be applied to their own advocacy priorities 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 global policy and advocacy, held within the consortium, will be made available to the selected consultant at contract signature to serve as the conceptual base of the manual. The consultant is not expected to develop that conceptual content from first principles, but is expected to restructure it into the common format of the manuals library, contextualize it for the Ethiopian policy environment, and build onto it the practical skills content described in Sections 4.2 to 4.4.

4.2 Module 1: Evidence-Based Policy Analysis and Advocacy

Objective: to build capacity to generate and analyse evidence, develop an organizational advocacy strategy, and engage credibly in policy dialogue at local, regional and federal level. Indicative content includes the concepts of policy, policy process and policy influencing, and the distinction between advocacy, lobbying, campaigning and service delivery; the legal and regulatory space within which civil society organizations in Ethiopia may engage in advocacy and policy dialogue, and the practical boundaries that follow from it; the policy cycle and the points within it at which influence is possible; problem identification and the framing of an advocacy issue; the construction of an advocacy objective that is specific enough to be achieved and monitored; evidence generation from programme data, community consultation and secondary sources; assessing the strength and limits of evidence; the translation of evidence into policy relevant argument, including the drafting of policy briefs, position papers and submissions; selection of advocacy approaches, covering direct engagement, coalition action, public mobilization and the use of formal consultation channels; planning and sequencing an advocacy initiative; risk assessment in advocacy work and the management of relationships with public authorities; and the monitoring of advocacy, including the use of indicators appropriate to influencing work where attribution is difficult. Practical instruments to be produced include an advocacy strategy template, a policy brief format and worked example, an advocacy objective setting worksheet, an evidence matrix, an advocacy action plan format and an advocacy monitoring framework.

4.3 Module 2: Stakeholder, Power and Context Analysis

Objective: to equip programme staff to map stakeholders and power relations and to conduct periodic context analysis that informs both programming and advocacy. This module is new content and is to be developed in full. Indicative content includes the identification and categorization of stakeholders relevant to an advocacy issue, covering decision makers, influencers, allies, opponents and affected constituencies; stakeholder mapping methods, including interest and influence mapping; analysis of formal and informal power, of how decisions are actually taken in a given institution, and of the entry points that follow; alliance and opposition analysis and the anticipation of counter positions; context analysis as a periodic organizational practice, covering the political, economic, social and security dimensions of the operating environment; conflict sensitivity and the application of do no harm principles to advocacy in environments affected by conflict; the establishment of a simple, repeatable context monitoring process proportionate to the size of the organization; and the connection between context analysis, programme adaptation and organizational risk management, cross referenced to the risk management content held in another manual of this library. Practical instruments to be produced include a stakeholder mapping tool, an interest and influence matrix, a power analysis worksheet, a context analysis format and a context monitoring calendar.

4.4 Module 3: Media Engagement and Public Communication

Objective: to enable organizations to engage media and communicate positions publicly in support of advocacy objectives. This module is new content and is to be developed in full. Indicative content includes the role of communication within an advocacy strategy rather than as a separate activity; audience identification and message development; the construction of a message that is accurate, evidence based and usable by a journalist; the Ethiopian media landscape in outline, covering broadcast, print, online and community media, and the practical differences in how each is approached; building and maintaining media relationships; the preparation of press releases, media advisories and opinion pieces; interview preparation and the handling of difficult questions; the use of social and digital platforms, including the management of risk arising from public communication; the verification of information before publication and the avoidance of inadvertent harm to communities, sources or staff; spokesperson designation and internal clearance of public statements; and the assessment of when public communication advances an advocacy objective and when quiet engagement is more effective. Practical instruments to be produced include a message development worksheet, press release and media advisory templates, a spokesperson briefing format, an interview preparation checklist and a communication risk assessment tool.

4.5 Confirmation of Emphasis

Because media engagement and power analysis were not independently surfaced by the capacity assessments, the consultant shall confirm the appropriate depth and emphasis of this content during the inception phase, through consultation with CSRC, with regional leads and, where CSRC arranges it, with a small number of staff from the technical track cohort. The inception report shall record the outcome of that consultation and shall state any consequent adjustment to the content proposed in Sections 4.3 and 4.4. The consultant shall not reduce the coverage of either area without the written agreement of CSRC, since both are commitments of the project design.

4.6 Cross-Cutting Requirements

Across all three modules the consultant shall calibrate content for organizations at different levels of maturity and operating at different levels of the system, since the cohort includes organizations engaging local administrations on service delivery issues as well as organizations seeking to influence

federal policy. The consultant shall indicate which content constitutes the foundational entry point and which is intended for organizations with established advocacy practice. Gender equality and social inclusion shall be reflected within each module, particularly in whose voice is represented in advocacy positions, in the accessibility of participation, and in the analysis of power. Content shall be politically neutral in the sense that it equips organizations with method rather than with positions, and shall not advocate for or against any political party, government position or contested policy outcome.

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; the consultation described in Section 4.5; drafting; participation in a validation session with CSRC, Christian Aid and regional leads; and revision of the draft in response to written consolidated comments. Any consultation with grantee organizations shall be arranged through CSRC and the relevant regional lead, and the consultant shall not approach grantees directly.

6. Deliverables and Indicative Schedule

All deliverables shall be submitted in English, in editable Microsoft Word format, with 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 existing material, outcome of the consultation required by Section 4.5, annotated outline by module, list of practical instruments to be produced, and work plan	Within 8 days of contract signature	5
2	First draft manual	Complete draft covering all three modules, including the practical instruments listed under each module in Section 4	Within 21 days of contract signature	14
3	Facilitator guide	Session plans, timing, facilitation notes, exercises built around advocacy issues drawn from the Ethiopian context, and pre and post training assessment instruments	Submitted with deliverable 2	4
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 27 days of contract signature	2

No.	Deliverable	Description	Indicative Timing	Days
6	Final manual and accompanying materials	Final versions of deliverables 2, 3 and 4 incorporating consolidated written comments, formatted and ready for use	Within 30 days of contract signature	2

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 tools, formats and worked examples over extended theoretical exposition.
- Exercises shall be built around advocacy issues realistically faced by Ethiopian civil society organizations, and shall be structured so that participants can apply each tool to their own organization priority during the session.
- Each substantive content section shall be traceable to the capacity area it addresses, so that responsiveness to the assessment findings and to the project commitments can be verified at review stage.
- Case material shall not identify any grantee organization, and shall not attribute positions to named public officials or institutions.
- 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. Where a firm applies, the lead expert shall meet the requirements below and the composition of the team shall demonstrate coverage of all three modules.

- An advanced degree in public policy, law, political science, development studies, communication or a related field.
- At least eight years of professional experience in policy analysis, advocacy or policy dialogue, of which a substantial part in or with the civil society sector.
- Demonstrated experience in developing advocacy training materials, curricula or toolkits, with samples of previous work to be submitted.
- Practical experience of advocacy or policy engagement in the Ethiopian context, and working knowledge of the legal and regulatory framework governing civil society engagement in advocacy and policy dialogue.
- Demonstrated competence in media engagement and public communication, or the inclusion of an associate expert covering that area.

- Demonstrated understanding of conflict sensitivity and of do no harm principles as applied to advocacy in environments affected by conflict.
- 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 and cascade toolkit	40 per cent
Third	Approval of the final manual and accompanying materials	40 per cent

10. Ownership and Confidentiality

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.

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 advocacy or policy training material, assessed on the samples submitted	25
Practical advocacy and policy engagement experience in the Ethiopian context	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.