

GUIDELINES

ORGANISATIONAL STRENGTHENING – NATIONAL PLATFORMS PARTNERSHIPS – CYCLE 6

INTRODUCTION

Cycle 6 of the [National Platforms Partnerships \(NPP\)](#) is going to be an opportunity to reactivate [Forus Capacity Strengthening Support](#). This guideline encompasses a reminder of the objectives set in the Forus strategy with a proposed roadmap to re-initiate the different offerings the network has in a much more harmonized and aligned way with the network's Monitoring, Evaluation, Accountability and Learning framework. For this, the process will begin with network wide self-assessment of the capacities of each national and regional platform part of Forus. Once the assessment is completed, members will have the opportunity to select, submit a request for the determined offering of their interest or co-create a new one. The journey will be constantly reviewed using a dynamic approach to monitoring and learning in order to stay relevant to the changing needs and adapting to the challenging context civil society is operating in.

BACKGROUND

Under [Forus' 2021-2025 strategic pillar 'SUPPORT'](#), Forus seeks to facilitate the capacity strengthening efforts of members to represent, convene and coordinate NGOs and civil society actors effectively around a common agenda for inclusive and sustainable societies.

Since 2017, Forus has enabled almost 50 national and regional platforms to access financial and in-kind support designed, allocated and evaluated by members. More [information about previous projects here](#). This support mechanism is created to support Forus National Members strengthen their structures, operations and abilities to respond to their members' needs, adapt to challenging and changing context, and sustain their work, agency and autonomy.

OBJECTIVES

Forus views capacity strengthening as a horizontal process that emphasizes learning together and from each other. Forus' approach is impact-oriented, needs based, peer-to-peer, and aims to develop leadership, promote expertise and innovation, and facilitate the exchange of practices at national, regional, and global levels. The ultimate goal is to **strengthen the voice of civil society worldwide and achieve ambitious and measurable impacts in sustainable and inclusive development**. Through Forus Capacity Strengthening work, the network aims to:

- ✓ Reinforce national platform's capacity to be functional, legitimate, accountable, inclusive and efficient NGO networks in their country.

- ✓ Support national platforms in achieving their own organizational goals, engaging their members effectively, and responding to national and local needs.
- ✓ Boost national platforms' capacities to voice their constituents' position and ambitions while remaining effective and independent actors despite the growing restrictions for civil society.
- ✓ Increase national civil society organizations' ability to hold governments and general decision-makers to account and to stand in solidarity with other CSOs globally.

SCOPE

Based on the feedback from members, the focus of the National Platforms Projects partnership for cycle 6 is **institutional strengthening**. In order for platforms of civil society organisations (CSOs) to effectively achieve their mission and vision, it is imperative to build or reinforce current systems, policies and process that enable them to sustain their work and meet its strategic objectives.

Below is an initial proposal of the potential focus areas within Institutional Strengthening for platforms of CSOs. that will be:

ORGANISATIONAL DEVELOPMENT FOCUS AREAS

- 1) Leadership & Governance; 2) Financial sustainability and growth; 3) Strategic planning and vision; 4) Project management; 5) Human Resources, Volunteers coordination and talent retention; 6) Communication; 7) Membership Engagement and Collaboration; 8) Monitoring, Evaluation, Accountability and Learning; 9) Digital skills. ¹

The areas and sub-areas will be reviewed with the **2024 Peer Committee**² and then assessed with the entire network with the aim is have a joint understanding of a) what does a 'strong CSO platform' look like for Forus members; b) what kind of capacities and areas of knowledge are most needed in the network, and c) which ones are least of priority to focus on the short term. To gather this data, all members will participate in the **2024 organisational assessment** that will enable them to move forward to submit a proposal for the Capacity Strengthening opportunity of their interest. The results of the organizational assessment 2024 will set the baseline for the network. This exercise will be crucial to evaluate effectively the progress platforms are making every year.

Members' engagement will be framed in the most flexible and low intensity way possible so the time commitment they need to offer to the process is very limited and will be of great value for their professional and organizational development.

¹ Proposed framework in Annex 1.

² Peer Committee role in Annex 2.

PROCESS

Cycle 6 - Program Creation/Management: 2024 Peer Committee

Interested members from diverse platforms with expertise in organizational development will contribute to shape the application process, approach and language of the organization assessment and call for proposals.

Cycle 6 - Application Process:

Forus members interested in participating in Capacity Strengthening Support mechanism will be invited to complete a three-parts application process:

1. **Organisational Assessment.** Online survey for all members to assess their current organization needs for support, identify their current strengths and areas of improvement in the short term.

The results of this assessment (self-identified needs and ability to leverage the support provided) will guide the Peer Committee to define the composition of the cohort of cycle 6 partners and will shape the foundation of Forus Capacity Strengthening baseline.

2. **Eligibility quiz for NPP cycle 6**
 - 2.1 Members interested in cycle 6 National Platforms Projects financial support will respond to a short quiz to assess their platform's capacity to comply with European Commission and l'Agence Francaise Development grant management requirements.
 - 2.2 In case the results are negative, a follow-up form will be open to express interest in other Capacity Strengthening opportunities, such as Forus Leadership Development Programme, Peer-Learning exchanges, Failures Fridays or co-create other support mechanisms with the network.
3. **Project Proposal.** Eligible applicants will be asked to submit a narrative and financial proposal aimed at providing a strategic response to the needs identified.
4. **Questions & Answers session.** Led by the Peer Committee, all interested members will be welcome at a virtual call to discuss questions about the application process; clarify any doubt about selection criteria, process or additional opportunities.

Cycle 6 - Selection Process:

Following the principles of participatory decision making, the Peer Committee will take the final decision of the composition of cycle 6 partners. If the platform of a member of the Peer Committee presents a proposal, that member will be excused from the Committee when their proposal is being discussed. The Committee will provide feedback to applicants and depending on time availability, applicants will be invited to interviews.

Cycle 6 - Onboarding:

Dedicated online session for the selected cohort to provide an overview of what the National Platforms Projects support mechanism entails, what learning opportunities are available and the

focal points in the Secretariat that will be engaging with them whether it is in Communications, Finance, Advocacy or Monitoring, Evaluation, Accountability and Learning.

A follow-up call will be organized bilaterally to discuss with each platform the financial requirements, compliance systems and reporting deadlines. This call will serve to identify the kind of accompaniment on financial management needed and its urgency.

TIMELINE

Steps	Deadlines
Peer Committee recruitment and preparation	15 - 25 July 2024
I. Self-assessment and project proposal	9 August to 8 September 2024
II. Project Proposal Q&A session	20 August 2024
Close call for applications	8 September 2024
Peer Committee analysis and decision	9 to 27 September 2024
Onboarding & Strategic & Financial Management accompaniment	5 to 10 October 2024
Possible start date for the projects	Activities supported by Forus might be eligible from November 2024, after administrative aspects are verified, partnership agreement are signed, and reporting requirements and rules are understood by partners.
Funds disbursement	The funds will be transferred in different instalments conditioned to the reception of reports.
Closure of the projects	December 2025

We anticipate that an additional cycle of projects (Cycle 7) will begin in August/September 2025 and will be adapted to respond to the learnings, recommendations and results gathered from cycle 6.

NATIONAL PLATFORMS PROJECTS CYCLE 6 OPPORTUNITY

FINANCIAL SUPPORT

- A maximum of 12 projects per cycle
- Up to €30,000 euros per National Platform

The determination of exact amounts will be based on a detailed list of activities agreed in a contract, the length (days) and extent of the service (activities, needs covered, members covered, inclusion of most vulnerable members).

IN-KIND SUPPORT

- **Project proposal guidance/ feedback**
- **Virtual sessions on grant management and reporting.**
- **(if needed) bookkeeping set-up coaching and general financial management good practices and tools at the set-up phase of the cycle.**
- **Further capacity strengthening/ accompaniment will be provided in other areas based on the results of the organisational assessment.**
- **Space, tools and guidance in effectively contributing to the learning journey of the network through peer-exchange sessions, buddy systems and general networking moments.**
- **Access to specific training courses and guidance from experienced practitioners on relevant topics; and resources to share with staff and members of the platform.**
- **Co-created tracking tools to self-monitor progress and assess impact.**
- **Networking opportunities with international stakeholders**
- **Visibility in Forus website and social media channels.**

ELIGIBILITY CRITERIA

In order to be eligible for the sixth cycle of capacity strengthening support, your organization should:

- **Be a Forus national member**
- **Be up to date with Forus membership fees (payment realized; committed or exempted until the year 2024)**
- **Be debt -free with Forus**
- **Be located in a country in the Development Assistance Committee's list of Official Development Assistance recipients. This is a requirement from the French Development Agency, which is the main source of funds for this cycle. Eligible countries are located in Africa, Asia, Pacific and Latin America except for the following countries, which are not eligible: Chile, Cook Islands, Japan, New-Zealand, South Korea, Uruguay, Seychelles & Taiwan.**

National platforms that are not eligible can be invited to be part of a project, or an activity implemented by an eligible member, since this support's global goal is to contribute to exchanges and learning in the Forus' network. Members are encouraged to reach out to one another to establish these links.

SELECTION CRITERIA

A non-compliance with a few or most of the financial procedures or other, will not automatically result in the dismissal of the project, since organisations with all levels of financial management capacity will receive the support.

- **Complete organizational assessment:** honest self-reflection of the status of the platform.

- **Project Relevance and Objective Alignment with the Call for Proposals:** Clear alignment of project objectives with the goals and priorities outlined in the call for proposals. Demonstrated critical thinking and understanding of the context.
- **Feasibility and Implementation Plan Clarity:** Clear description of planned activities, roles, and responsibilities, ensuring project feasibility and intended impact.
- **Budget Coherence:** A detailed, coherent budget proposal that aligns with project objectives and demonstrates the effective use of funds.
- **Impact and Sustainability:** The proposed project to produce solid foundation, clear project objectives, long-term benefits and tools and strategies to continue contributing to the platform's sustainability after the cycle.
- **Monitoring Plan:** Presence of a robust plan to evaluate the impact and reach of the project.
- **Capacity and Experience:** Demonstrated ability of the platform to implement the project, meeting financial and operational requirements.
- Moments for collecting and analysing data should be planned ahead during the entire project and already be visible in the project proposal form.
- **Capacities are developed institutionally rather than individually:** the capacity development support should contribute to the implementation of processes that will be embedded into organisational practices, which will remain despite changes in staff of the platform. Proposals will demonstrate a plan to share information within the platform and its members will provide feedback on the changes they perceive the platform is making with the additional support in their structure and operations.
- **Partnerships for knowledge production:** the project foresees partnerships with other stakeholders that provide an additional set of knowledge that would enrich the project. Proposals will be evaluated on the plans to share back lessons learned and stories of change or reflections with the Forus network.
- The selection process will aim to be equitable in opportunities available in the network among members.

BONUS

- Platform already having a representative governance structure and policies that speaks to gender justice and intergenerational collaboration or proposal intending to explore this.
- Platforms with high level of members engagement in the platform's live/ activities or a proposal aiming to strengthen this component.
- Demonstrated intentions or experience sharing learnings and organizational development resources/opportunities with other national and regional platforms of CSOs.
- Sustainability plan for all policies, procedures, practices or tools developed during the cycle.

- **Platforms that share evidence of progress made after the last cycle or any capacity strengthening opportunity they participated in.**

ACCESSIBILITY

- **Platforms operating in environments with low connectivity are welcome to submit the answers to their organizational assessment and proposed project via e-mail instead of using Survey Monkey.**
- **Projects are welcome to be submitted in English, Spanish, French and Portuguese.**
- **Platforms can adjust their proposal after the Q&A session.**
- **Platforms that identify a need for training on financial reporting and for setting up a double-entry bookkeeping system (debit/credit) may ask for additional financial support of 1,000 euros to cover the training fees and software license costs.**

IMPACT MEASUREMENT

Baseline

The first part of Cycle 6 Application Form will be an organizational assessment that will provide a baseline or at least an approximate understanding of where Forus members are in their growth journey. The assessment will be as candid, open and objective as possible, as it will help us assess the usefulness of the Forus Capacity Strengthening support, particularly the support through the NPP program, the progress realized through this support mechanism to the entire network, members constituents, and our donors, to justify their support to future rounds of support.

Progress Tracking

During the course of the year, members will have a progress tracking tool to regularly check-in internally the progress they are perceiving, learnings, surprises and challenges. This will be a self-assessment tool that will gather the data that will be then shared during the quarterly peer-accountability meetings, where members gather in small groups to exchange their lessons learned thus far and where they need extra support.

360 Review - End Line & Reporting

Once the cycle is completed, partners will respond to an End Line survey. The questions will be the same as the baseline and the intention is to evaluate if the kind, amount and length of support provided during cycle 6 contributed to any change in members structures and why.

LEARNING

Forus needs to consider the multiple worldviews existing in its network as well as the diverse interpretations and conceptualizations of impact linked to context. The impact evaluation of the diverse offerings of Forus Capacity Strengthening support will shed an important light into

national and regional platforms' constituents' feedback. It will be the perception of national platform's key stakeholders that will assess the progress the platform is making with the support offered.

DATA COLLECTION

According to the Forus MEAL Framework and Guiding Documents, statements about the impact of the activities need to be evidence-based and cannot come from one only person writing the report. This means that the members implementing projects need to foresee at least one formal channel for data collection during the project, such as evaluation forms, feedback surveys, interviews, focus groups, or any other system that allows the organization to collect and analyze feedback from at least 70% of the participants in the action. Forus' members can combine quantitative and qualitative data, using quotes from their own members for the latter.

DATA SHARING

In case the project is not considered to be a success, members need to think through the experience in order to build a clear communication of what was learnt in the process, developing recommendations to have in mind for similar projects in the future. Sharing knowledge based on the concrete experience of a member with the network is coherent with the main objectives of this support and contributes to the collective learning in the network. The Forus Secretariat can be mindful of what is shared only among Forus members and what remains available for consultation online.

DATA MANAGEMENT

All data is carefully managed by the Forus Secretariat. Only the Secretariat will have access to all the answers from the organizational assessment and data collection. The Peer Committee will receive the list of applications to score. None of the information collected will be published or shared without the previous consent of members.

All the useful documents for Forus' support to capacity development projects are **available here in English, French and Spanish**. If you need further information on these Guidelines or the support to national projects, please contact elisa.novoa@forus-international.org

ANNEXES

1. ORGANISATIONAL DEVELOPMENT FOCUS AREAS

Leadership & Governance & Network Management	<p>Mission, vision and values</p> <p>Leadership and governance structures</p> <p>Diversity, Inclusion, Equity and Justice in governing bodies</p> <p>Safeguarding - Code of conducts</p> <p>Transparent and accountable decision-making</p>
Sustainability & Growth	<p>Financial Management - budget / expenses tracking</p> <p>Financial health, planning and management practices</p> <p>Accounting system</p> <p>Audited financial reports</p> <p>Grant management & diverse funding base - fundraising</p>
Strategic Planning and Vision	<p>Strategic plan and Theory of Change</p> <p>Goals alignment to long-term goals - political agenda</p> <p>Measurement goals</p> <p>Adapting and agile planning, innovation and foresight</p> <p>Organisational planning and programmatic coordination</p>
Programme Effectiveness and Impact	<p>Task management and project management processes and software</p> <p>Quality and impact of programmes</p> <p>Risk assessment and management</p> <p>Knowledge management and transfer</p> <p>Stakeholder/ partner engagement and consortium management</p>
Human Resources and Talent Management	<p>HR policies, protocols and recruitment guidelines</p> <p>HR turnover, talent retention</p> <p>Knowledge management - transitions</p> <p>Volunteers' coordination policies</p>
Communication	<p>Digital presence, social media engagement, network recognition</p> <p>Public speaking and campaigning/ advocacy</p> <p>Communication strategies</p> <p>Internal and external communications</p> <p>Internal communication tools: Intranet, internal newsletter, internal webinars, blogs from members, etc.</p>
Memberships and Collaboration	<p>Diverse, effective and regular membership engagement</p> <p>Membership policy and engagement strategy</p> <p>National, regional and international collaborations/ strategic partnerships. Consortium set-up</p> <p>Event facilitation, design thinking, network building</p>
Monitoring, Evaluation, Accountability and Learning	<p>Results framework, shared evaluation approaches and self-regulation</p> <p>Tracking and impact assessment tools and practices</p> <p>Evaluation and reporting processes and tools</p> <p>Feedback mechanisms and systems</p> <p>Continuous organisational learning and improvement processes</p> <p>Data management</p>

Digital Skills	Digital security policy and practices Knowledge on AI for social change and organisational effectiveness and an Ethical use of AI policy. Data collection and responsible data protection and management
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2. 2024 PEER COMMITTEE

We commit to employing participatory methods that put the voices and needs of our members first. As a member-led mechanism, the decisions of how the parameters of the program, its participants and evaluation will rely on Forus members, while remaining compliant to donor requirements and deadlines.

A group composed of individuals (volunteers) from Forus national and regional members (staff or governance bodies) will have the possibility to steer the National Platforms Projects as part of the **Cycle 6 Peer Committee**. This Committee will be formed by approximately 9 volunteers with experience in organizational strengthening efforts and representative of the geographical diversity of the network, taking into consideration gender / age / language, and the different role members play within the network (governance, active working group members, smaller organizations that usually have less capacity to engage, etc.) The Peer Committee will work in coordination by Forus' Secretariat and in open communication with the rest of the network. **The Peer Committee will shape the selection criteria, indicators of success and take final decisions on the number of projects receiving support, as well as on the exact amount granted per project.**

The Peer Committee will analyze the relevance, feasibility, and cost-effectiveness, following the present Guidelines and the Analysis grid. The final selection will aim to be diverse with regards to proposed activities, languages and regions.

The Peer Committee will decide which projects are not chosen for support during cycle 6 and will provide detailed feedback on the project on a case-by-case basis.