



FORUS Terms of Reference
Engaging Public Development Banks Research Study & Capacity Strengthening Toolkit
5 March 2024

1. Background and rationale

Research start date: April 2024

Location: Remote

[Forus](#) is an innovative global network empowering civil society for effective social change. It brings together 69 National NGO Platforms and 7 Regional Coalitions from Africa, America, Asia, Europe, and Pacific.

Forus is seeking an external consultant to develop a research study in addition to a capacity strengthening toolkit (based mainly on the content of the research paper). A key objective of the research is to strengthen Forus' members engagement with Public Development Banks (PDBs) by influencing PDB policies, procedures and operations at national, regional and/or global levels. The target audience for this initiative will be Forus members (national and/or regional CSO networks and members / partners of Forus members). The publication will likely be used as an internal document. However, external publication of the document (or a revised version) may be considered following review by the CSO networks involved and Forus' membership.

The capacity strengthening toolkit is expected to develop steps/ recommendations (procedural, strategic, ways of working) in which civil society, namely national and regional CSO networks that engage with PDBs through advocacy and/or policy engagement, using the lessons-learned and insights of experienced CSO networks with expertise on advocacy/policy engagement with multi-lateral development banks.

2. Objective of the service

The main objective of the research will be to produce a high- quality research paper for PDB advocacy and policy engagement and an accompanying capacity strengthening toolkit for the Forus network which will demonstrate ways in which experienced CSO networks engage and influence PDBs based in and/or operating in Latin America, Africa and/or Asia. This research will include 1) a literature review of up-to-date studies and material developed and/or used by CSO networks and 2) interviews with CSOs and relevant stakeholders (PDB representatives, affected community members and other. The consultant will utilise the key findings, extracting insights, lessons-learned and recommendations for the development of a capacity strengthening toolkit for effective engagement with PDBs in advocacy and campaigning.

3. Tasks of the Consultant

The consultant will be responsible for:

- (a) Conducting a literature review of the work of at least 3 CSO networks that focus on advocacy / policy engagement with multi-lateral development banks to understand opportunities, challenges and lessons-learned for the development of 1) a high-quality research paper and 2) an accompanying capacity strengthening toolkit for CSOS. The research study and toolkit will seek to provide insights and knowledge about how to engage and do advocacy with Public Development Banks (PDBs), national or multi-lateral development banks. While it is likely that the literature review for the research paper will cover relevant content for the capacity strengthening toolkit, the Consultant will include desk research for the capacity strengthening/learning aspects of the toolkit (how to guide). The toolkit will have comprehensive information and include a step-to-step guide on how to develop a PDB advocacy strategy. The toolkit will also include sections on PDB advocacy and campaigning activities, a resource list and cover other relevant topics as advised by the Consultant.
- (b) Using the results of the literature review to design and conduct interviews involving at least 3 CSO experienced networks focused on influencing multi-lateral development banks. The Consultant will conduct an estimate 10 interviews per network comprised of: at least 5 CSOs; 3 affected community stakeholders and/or community-based organisations (if network engages at the community level); and, 1-2 multi-lateral bank representatives; 1 government official (where possible).
Note: Forus will make available contact information for interviews where possible (especially with CSOs) and provide feedback on the design of interview questions (estimate 10 questions / interview). Interview questions should be adapted according to stakeholder and context. The Consultant may choose to utilise questionnaires where interviews are not feasible or to gather additional information (to complement interviews)
- (c) Using a case study approach to highlight lessons-learned to demonstrate the best and worst experiences related to influencing PDBs based on strategies.
- (d) Analysing the results of the research (desk research and interviews) in collaboration with the Forus Secretariat.
- (e) Proposing key recommendations that could cover issues related to governance / ways of working (such as in a network or other); effective tactics / strategies for engagement in PDB policies and/or practice based on the priorities of the network (transparency and accountability; environmental and social safeguards; human rights; community / civil society consultation; gender) or other.

4. Deliverables

- a) Inception report, including a detailed methodology, list of interviewees and materials / tools to be used for the research study and toolkit.
- b) Research report (estimate 20-25 pages max excluding appendices) in English addressing the interview questions (adapted to stakeholder /context- as they may differ) and including:
 - Executive summary of key findings and recommendations.
 - Interview / questionnaire summaries (interview summaries to be shared with the report for Forus internal records only).
 - Evaluation findings, analysis and conclusions with associated evidence and data clearly illustrated. Use of tables, graphs, quotes, anecdotes, and stories to illustrate findings and conclusions is encouraged.

- Case studies to illustrate stories of the impact of 2-3 CSO networks and its members on specific PDB operations, policies and practices based on the network advocacy / campaigning priorities (such as transparency and accountability; environmental and social safeguards; human rights; community / civil society consultation; gender or other).
 - Recommendations for the next actions, which should be practical and linked directly to conclusions.
 - Appendices, including methodology and evaluation tools, list of interviewees, questionnaire, and brief biography of consultant.
- c) Development of capacity strengthening toolkit (15-20 pg. max excluding appendices) based on research report (structure and themes based on findings of the research paper and to be done in consultation with the Forus Secretariat). While it is advised that most of the desk research for capacity strengthening /learning aspects for the toolkit (how to guide) be done at the initial stage of the project, the Consultant may consider doing additional research based on the findings of the research paper. The content of the toolkit will include:
- A step-to-step guide on how to develop a PDB advocacy strategy.
 - A section focused on the different types of effective CSO advocacy and campaigning activities, including a highlights section (i.e. case study boxes) of activities that have brought about success based on real experiences (as identified in the PDB study).
 - A resource section which will include links of the websites of CSO networks (focused on PDB advocacy and campaigning); PDB research papers or policy briefs; advocacy and campaigning media material (press briefs; articles; OpEds); successful examples of effective social media campaigns and social media posts; and other relevant material based on research findings.
 - Sections on other relevant topics as advised by the Consultant that would provide additional value to the capacity strengthening toolkit.
- d) Two to three presentations of the research study and capacity strengthening toolkit to Forus Secretariat / Forus Members / relevant stakeholders and partners (in different time zones). This could be face to face, by remote (i.e. using Zoom platform) and/or be a video or podcast presentation.

Note: Final payment is dependent on the submission and approval of the final research study, toolkit and presentations.

5. Profile and qualifications of the consultant

Applicants may be individuals or a team of consultants. As a diverse network, Forus encourages mixed teams, with different backgrounds and genders.

Key qualifications:

- Relevant academic degree (master level).
- A minimum of ten years' experience and expertise in the non-profit sector, preferably networks in the field of development and linked to networks.
- Demonstrated skills in research with knowledge/experience in advocacy, policy, campaigning work, preferably on Public Development Banks implemented by NGOs.

6. Location and duration of the research work

Location: Flexible

Duration of the research work: Estimate 4-5 months as per the proposed Calendar Work Table in Section 7.

The research consultant can work remotely and carry out the literature review online and field research through online interviews with CSO networks and other relevant parties. Collaboration on the Forus research study and capacity strengthening toolkit can also be done online and remotely.

The Consultant will deliver on the work specified above over an average of 25-30 days during a 4-5 month-period (April- August 2024).

The assignment is estimated to be in the range of Eur 6,000- 8,000 based on experience, qualifications and price proposal.

7. Calendar of work

Engaging PDBs Research Study & Toolkit Calendar of Work

PERIOD	Key tasks	Responsible
Phase 1: April 2024		
Literature Review Online Interviews	Conduct literature review of information available on the work of CSO networks online, especially CSO networks focus on multilateral development banks (MDBS such as African Development Bank; Inter-American Development Bank; Asia Development Bank; World Bank; or other). <u>Note:</u> Forus Secretariat can provide some examples of website links for materials and CSO contacts to the Consultant.	Consultant & Forus (for resource/contact links)
	Analyse and write up summary of key findings.	Consultant
	Design interview questions and get input / review from Forus Secretariat. Where persons may not be accessible for an interview, a written questionnaire can also be used as a second option) for limited numbers.	Consultant & support by Forus secretariat for review / input
	Create interview list with input and review from Forus Secretariat / members,	Consultant & Forus (for resource/

	CSOs/network partners and relevant contacts.	contact links)
	Conduct interviews and summarise findings. <u>Note:</u> Interview summaries as part of report appendix (for internal records only).	Consultant
Phase 2: May 2024		
Online Interviews Analyse findings Develop research study and tool kit content	Conduct interviews and summarise findings (continued).	Consultant
	Analyse findings for research and development of research study and tool kit content.	Consultant
Phase 3 : May-June		
Report-writing & development of capacity strengthening toolkit	Write full research report synthesising results of literature review, main findings of interviews / CSO Network case studies and recommendations arising.	Consultant
	Develop a toolkit (15-20 pg. max excluding appendices) aimed at Forus members based on the key findings and recommendations of the literature review, interviews and the case studies. Consultant will work with Forus Secretariat on the structure and themes based on the findings of the research paper.	Consultant with Forus Secretariat support on design
Phase 4: June-July		
Review and Sign off		
	Share draft 1 of the research study and toolkit for review with Forus / other peer reviewers (2 or 3 from CSO networks or Forus Members) and address comments / issues. Anticipate 5-10 working days for feedback (with advance notification of dates).	Consultant / Forus / Peer Reviewers
	2nd review: address final comments Antcipate 5 working days for last feedback (with advance notification of dates TBC).	Consultant / Forus / Peer Reviewers

	English Copy Edit, translations /review in 3 languages, PDF design research study and toolkits in July/August	Forus Secretariat & External Service Providers
	<p>NOTES</p> <ul style="list-style-type: none"> -Copy edit 5-10 days (estimate) -Translation French / Spanish / Portuguese (5-10 days TBC) - Review of translations: 3-5 days (part-time working) TBC -PDF Design (to be done in advance – where possible- require text insert) 5 days TBC 	Forus Secretariat & External Service Providers
Phase 5: July-August		
Presentations of Research Study and Capacity Strengthening Tool Kit		
	Completion (if more time needed) of English Copy Edit, translations /review in 3 languages, PDF design research study and toolkits in July/August	Forus / external service providers
	<p>Presentation / launch of research study and tool kit to Forus members (and members' members).</p> <p>This could be face to face, webinars (i.e. using Zoom platform) and/or be a video or podcast presentation.</p> <p>Note: Dates to be discussed / planned in advance.</p>	Consultant

8. Profile and qualifications of the consultant

- Preferably hold a postgraduate degree (PHD or Masters) in the field of research, in development studies/development economics/development finance.
- Proven experience of conducting field research and online interviews.
- Experience working with an NGO active in the development sector, particularly on development finance. Expertise on Public Development Banks an advantage.
- An excellent standard of written and spoken English. and strong writing and communication skills.

9. Composition of the application

The application file should include:

- A letter of motivation addressed to the Forus Project Coordinator (Finance for Development).
- A price proposal.
- A detailed and complete Curriculum Vitae for the consultant(s) involved in the assignment.
- References from previous, comparable assignments.

Application deadline:

The file will have to be submitted by 26 March 2024 in electronic format at the following address: recruitment@forus-international.org