

Call for proposals: Learning consultant to capture learning from exploration grants into new topics of gender equity and democratic governance and civic engagement within Porticus' 'Society' sector

8 August, 2022

Introduction

Porticus is an international organisation that manages and develops the philanthropic programmes of charitable entities established by Brenninkmeijer family entrepreneurs. Porticus collaborates with partners around the globe to foster human dignity, social justice and sustainability. Porticus engages local and global partners to tackle root causes of problems in the areas of education, society, faith and climate, to create societies and systems that work for everyone.

Within the Society sector, we seek to promote equality, human rights and human dignity - where all people have the agency to lead self-determined lives. We are committed to applying a gender equity and social inclusion lens and to ensure the meaningful participation of the people we serve in all we do. In living out this vision, we decided in 2021 to explore funding for two new topic areas:

- gender equity
- democratic governance and civic engagement.

These new topics will be explored through the six regions of Africa, Asia, Europe, Latin America, Middle East and North Africa, and North America.

An internal working group, supported by expert advisors in both topics, are taking part in a learning journey across both topics in order to develop well-founded strategic recommendations for Porticus' future support in these areas.

To date, we have:

- conducted a mapping of our previous work in the two topics we are exploring and distilled the key highlights
- appointed external thematic experts to provide inputs at strategic points and review any critical material
- conducted a landscape analysis (based on advice and inputs from our external thematic experts as well as interviews with key institutions active in these topics)
- narrowed down scope of our strategic exploration based on certain criteria and focused on building institutional capacity and understanding of these topics through learning calls and conversations with experts.

We are soon to: 1) start making grants to organisations who are active in these topics and 2) make recommendations for potential long term funding opportunities for Porticus in these topics.



Purpose of this learning consultancy

With this call for proposals, Porticus' Society sector is looking for a learning consultant to work closely with us and a core team of grantee partners to deepen our understanding of the issues, approaches, and interventions available to inform the development of long term funding strategies in the two new areas of i) gender equity and ii) democratic governance and civic engagement.

Porticus is looking for an experienced learning practitioner who can work closely with the working group, and especially the programme manager leading this work, to frame our ongoing learning focus and engage with expert individuals, organisations and Porticus grantee partners to capture insights and feed in learning to our strategic development of these topics. The learning consultant will play the role of a critical friend and a sparring partner to the programme manager and the working group, and will have some cross over with the expert advisors already engaged in this work.

Initial learning questions identified for new topic grants

Porticus has identified initial learning questions, below, which should guide the learning approach/framework for the new topic grants. We require the successful learning consultant to:

- review, refine and reduce these, in conversation with Porticus and with grantee partners - the learning questions should also be useful to grantee partners, not only Porticus.
- review learning questions developed for other grant making efforts, so that these are synchronised where possible, and complementary
- become familiar with a new approach to learning with grantee partners that Porticus is rolling out later in 2022.

These learning questions will be explored through global grants (multi-regional) and grants focused on a specific country / region that Porticus will make in these new topics, through interviews with grantee partners, as well as review of key external documents and research.

Gender:

1. Movement building and support*:

- What are movements? Why should, or shouldn't, philanthropy support movement building??
- What examples are there of successful movements supported by our grantee partners?
- What are the key tactics used by movements to create sustainable shifts in power structures and bring about systemic change?
- How are movements identified, assessed (for funding and non-financial support), and supported? How do movements navigate the inherent power dynamics within the funding eco-system? How are these dynamics managed or mitigated?
- How do grantee partners measure and understand the impact of movements?
- What does the movement building (and supporting) eco-system look like and what are ways for Porticus to support and fund movements?

2. Priorities, contexts, and approaches:

- What are the priorities (both thematic and geographic) and approaches of our grantee partners in issues related to gender equity and social inclusion? What change are grantee partners aiming for and how do they expect this change to come about? What similarities and differences are there in these theories of change?

- Are grantee partners working towards increased participation of women and youth in democratic space? If yes, how? How are they engaging men as allies for women leadership?
- What does intersectionality mean to our grantee partners and to what extent and how do they integrate intersectionality in their approach? What lessons have emerged when taking an intersectional approach?
- What are the key systems, actors, and interventions available to create impact in this topic? How do these systems connect with others at national, regional, cross-regional, and global levels?

3. Ways of working (such as decision making models) and challenges:

- How do the grantee partners operate (especially women's funds); what are the key mechanisms/ principles of how they operate (such as participatory grant making, open call applications, identifying where funding is needed)?
- What are the challenges / risks associated with how the grantee partners operate and how do they circumvent this?

DG&CE:

1. Root causes and Theory of Change:

- What problems and issues are the grantee partners trying to address? What are the symptoms and root causes of these social challenges? How did partners determine these root causes?
- What change are grantee partners aiming for and how do they expect this change to come about? What similarities and differences are there in these theories of change?
- Topic specific questions (some examples are shared below) will be drafted in collaboration with the grantee partner based on their area of work) such as:
 - How are grantee partners working towards increased women and youth participation in democratic space? How are they engaging men as allies for women leadership?
 - What are the approaches being adopted towards countering disinformation and the role of technology in shrinking/creating civic space?
 - How is the work of the grantee partner combatting populism/authoritarianism?
- How do they respond to shifting environmental-social-political forces ((local/regional/global); climate change, natural disasters, conflict, fight for human rights, increased migration etc.) and how do they evaluate and measure their impact?
- Do they support movements? If yes, why and how? (**Note that movement related questions are relevant for and will be explored across both topics*).
- What are the key systems, actors, and interventions available to create impact in this topic? How do these systems connect with others at national, regional, cross-regional, and global levels?

2. Target group and intersectionality:

- Who are the target groups/ programmes participants/ stakeholders for their work and why? How do they include voices of people who have been marginalized in their work? How are they accountable to their target groups/stakeholders?
- What are the intersectional approaches adopted by grantee partners towards pushing to expand DG&CE to bring in and be accountable to historically marginalised groups (noting these groups are also historically marginalised due to colonialism, capitalism, patriarchy, misogyny, homophobia, ableism, class etc).

3. Ways of working (such as decision making models) and challenges:

- How do the grantee partners operate; what are the key mechanisms/ principles of how they operate (such as participatory grant making, identifying where funding is needed etc.)?
- What are the challenges / risks associated with how the grantee partners operate and how do they circumvent this?

Anticipated approach and Key Responsibilities

The approach will need to balance the burden on partners with the learning need of Porticus to inform its strategic development into these new topics. We anticipate it would include the following stages, but we are open to other suggestions.

1. Review of existing data and relevant documentation, including:
 - Learning frameworks in development within Porticus
 - Society sector vision and related documents
 - Mapping, findings and recommendations resulting from the 2021 exploration of these two new topics
 - Applications and agreements from the grants Porticus approves
2. Develop a learning approach/framework for new topic grants, including:
 - a. Refine the identified learning questions to guide the learning from grants and grantee partners
 - b. Seek input from our grantee partners in refining both the approach and the identified learning questions
 - c. Work with grantee partners to establish a way to capture learnings and reflections, building on or complementing MEL systems or structures already in place within grantee partner organisations, and within Porticus.

We anticipate this will involve primarily qualitative methods, such as interviews or structured learning conversations with grantee partners, learning conversations with staff and potentially expert advisors.

We would like people with lived experiences of the issues we are exploring to be included in the learning approach, and require the successful learning consultant to proactively consider this in their learning framework.

3. Fieldwork:
 - a. Facilitate exchange of learning with grantee partners, experts, working group and programme manager
 - b. Facilitate learning loop – feeding in learning from grantee partners to working group learning calls/exchanges
4. Feed in and bring together findings, learning and recommendations for Porticus, including through:
 - a. Acting as critical friend and sparring partner to the programme manager – regular meetings to feed in insights
 - b. Supporting the working group and especially the programme manager in developing an recommendations for potential long term funding options in these topics and ultimately a final strategy that reflects and responds to the learning gained from this process
 - c. Collating and reporting learnings across all grants and grantee partners for identified questions (for both internal and external audiences) incl. assumptions, gaps, infographics with key highlights

Deliverables

- Agreement of refined learning questions with inputs from internal stakeholders and grantee partners (October 2022)
- Learning plan, setting out how, what type of data, from which data source will be captured, and when, in order to answer the learning questions (October 2022)
- Ongoing learning loop: regular sessions with working group and programme manager and interim learning updates which can be shared with stakeholders across Porticus (October 2022 – December 2023)
- Sharing learning and feeding in insights via regular meetings with programme manager (October 2022 – December 2023)
- Short videos, infographics etc. which can be used as communication material to highlight key points and ongoing learning through the process (October 2022 – December 2023)
- Input into recommendations for potential long term funding opportunities for Porticus in these topics (January – February 2022)
- Final report/presentation slide deck which summarises key learnings across all grants and grantee partners (first draft by October 2023)

Suggested timeframe

- August and September week 1– discussions with interested parties and contracting with team that fits
- September (week 2 and 3) – finalizing the learning framework
- September 2022 to December 2023: duration of the assignment

Stakeholders involved

We anticipate the following roles and responsibilities of each stakeholder:

Stakeholder		Role	Involvement with learning consultant
Porticus	Programme Manager	The Programme Manager leads the strategic and programmatic development of the new topics	<ul style="list-style-type: none"> - The Programme Manager will commission and manage the learning consultant - The learning consultant will be accountable to the Programme Manager for submitting deliverables and will be the first point of contact for any management/delivery issues or issues of concern - Members from the Working Group will participate in the selection of the learning consultant - Participate in learning sessions - Review draft and final deliverables
	Working Group	Regional representatives involved in the strategic and programmatic development of new topics	
	Grant Manager	Supports grant making and the management of grants	
	Effective Philanthropy Group – Senior Analyst and the GESI team	Supports the learning objectives of new topics	
Expert advisors		Provides feedback on approach and content for strategy development	<ul style="list-style-type: none"> - Provide input to the learning consultant for the development of the learning framework

		<ul style="list-style-type: none"> - Participate and/or take an active role in learning sessions - Review the draft and final deliverables
Grantee partners	Implements grants and learn with us	<ul style="list-style-type: none"> - Contribute to the development of the learning questions that will frame this approach and to the design of the learning tools and plan - Participate and/or take an active role in learning sessions

Learning consultant requirements

We anticipate an independent consultant or a small team would best provide the mix of expertise, experience and skills required for this work, which includes:

- Preference for individual (or teams) with lived experience of the issues we are exploring
- Proven track record in supporting a collaborative approach to learning and in delivering high quality and complex learning reports;
- Extensive conceptual and methodological skills and facilitating learning experiences;
- Strong skills in group facilitation and partner convening; a fundamental part of the role will be to accompany Porticus and grantee partners on the learning journey, in which we are all working out our roles;
- Enthusiasm for learning from what does not work as well as what does;
- Responsiveness and adaptability to change and new circumstances;
- A solid command of technologies to overcome the constraints of face-to-face meetings and interviews;
- Adept at producing communication material such as infographics, videos etc.
- Sensitivity to and respect for cultural differences and lived experiences
- Comfort in working and communicating across difference, including being able to communicate complex and sensitive ideas in accessible ways and gather data from and with partners across society;

Working languages: A high level of written and verbal proficiency in English is required.

It will also be necessary for the successful team to be independent from the grantee partners, demonstrate it has no conflict of interest with any of the grantee partners involved and no stake in the outcome of the evaluation

Ethical considerations

All those engaged in designing, conducting and managing learning activities will aspire to conduct high quality and ethical work guided by professional standards and ethical and moral principles. The team must clearly identify any potential ethical issues and bottlenecks that may impede or undermine the minimum ethical requirements.

Budget and duration of learning consultancy

The initial duration of this project will be from September 2022 until December 2023.

We would like the team tendering for this work to propose a budget and a time breakdown that fits the methodology they propose. As an indication, we would expect the budget for this work, including the deliverables requested and proposed and all costs incurred for all administrative and logistical arrangements, to fall within the range of EUR50k-70k. However, please treat this only as a ball park figure; we stress that the budget should reflect the proposed methodology that best meets the desired deliverables.

Application process

We are inviting a small number of independent consultants (or small teams) to consider this call for proposals. This is due to both a tight timeframe to commission and because we are only looking for independent consultants (or small teams) that demonstrate they prioritise equity in their approach and team.

We would like to discuss with each interested party informally in order to give as much information as possible to inform a decision to submit a proposal, or not. Ideally we would do this through an joint session so as to be transparent, but if this is not possible we can also hold one to one meetings to discuss. We will ensure that anything we share will be shared openly with all interested parties.

We would be seeking an initial proposal, of **not more than 15 pages**, outlining your understanding of the work, and your proposal to implement it, with a budget that reflects tasks and rates, and a **summary** profile of each team member.

The deadline for submitting proposals will be **August 31, 2022**. Please send your proposals and questions to Dipti Singhi (d.singhi@porticus.com) and Tien Hui Woon (t.woon@porticus.com). Porticus will review applications and conduct interviews on a rolling basis.

Vetting process of bids

We will assess proposals according to how well the proposed methodology meets the requirements set out in this ToR and the expertise and experience of the team. The learning consultant will be selected based on the following criteria:

- Experience
- Quality of the technical proposal
- Technical expertise of the members of the learning team
- Lived experience of the team members
- Value of the technical proposal (financial offer)