

TERMS OF REFERENCE RESOURCE ALLOCATION CONSULTANT

1) Background

The IPPF formula-based allocation model for unrestricted income has remained relatively unchanged since it was first introduced in 1997. During the May 2019 Governing Council meeting, it was agreed to undertake a detailed review of the IPPF model with a view to making recommendations for its revision or complete overhaul.

The review was conducted by an independent commission of experts supported by federation stakeholders. Over the course of the four-month review, which included extensive consultations, the Commission heard compelling testimony from all corners of the Federation and from among key stakeholders.

The Commission concluded that the existing allocation approach was not well understood and not uniformly applied. In addition, there were concerns about transparency relating to decision making. The commission concluded that the resource allocation model is no longer fit for purpose.

In October 2019, the Commission proposed:

- a) A new resource allocation model that proposed three unique funding streams;
- b) The new model to be more flexible, transparent, and closely aligned with the strategic outcomes of the Federation.

During September and October 2019, the Commission shared its preliminary report and recommendations for a new model with the Federation. The recommendation was adopted by consensus by the General Assembly and endorsed by the IPPF Governing Council.

In December 2019, to prepare the secretariat for implementation of the new model, the IPPF Director General convened a secretariat-based working group, known as the Resource Allocation Support Team. The team has two main deliverables:

1. Develop a new formula for stream 1 of the model, relating to Member Association and IPPF Secretariat allocation.
2. Develop full guidelines for the different streams under the new resource allocation model

Their work forms part of a larger transition action plan that is overseen by a dedicated Transition Committee established by IPPF's Governing Council.

2) Objective

IPPF is soliciting tenders from expert consultants or firms to deliver on the following objective:

“Develop a new allocation formula for unrestricted (core) funding, including performance measures, and a process for MAs and the secretariat to apply for this funding, based on their three year plans.

This new formula, performance measures and process for core funding should take into account the MAs and the Secretariat’s access to all other restricted or earned sources. ”

3) Scope of Work

To achieve the objective, the key tasks that need to be undertaken are as follows:

- a) Desk Review and Stakeholder interviews
 - Take note of IPPF’s strategic framework 2016-2022 and Business plans;
 - Take note of the Resource Allocation framework duly approved by the General Assembly and Governing Council and its related documentation;
 - Take note of current practices of resource allocation across the IPPF and the Member Associations including the implementation of the Performance Based Funding (PBF) and challenges thereof;
 - Take note of the strategies and priorities set up by IPPF, which include the Humanitarian Strategy and the current key performance indicators being monitored by IPPF;
 - Interview key stakeholders.
- b) Design and undertake online and offline consultative process with key stakeholders;
 - Assist with the construction of electronic surveys questions
 - Perform response analysis.
- c) Develop a new resource allocation formula for approval by the Transition Committee;
- d) Develop a set of guidelines for implementation of the aforesaid formula under Stream 1 of the new IPPF Resource Allocation model.
- e) Review draft guidelines and framework developed for funding Streams 2 and 3, ensuring alignment and synergies between all the three streams.
- f) Provide input to the Resource Allocation Support Team regarding replicable practices and models. These could include GAVI, the Red Cross, and the WHO (others might include Mercy Corps, Médecins Sans Frontières, or CARE);
- g) Assist the Resource Allocation working group, with presentations and consultations with key stakeholders including the Transition Committee, the Governing Council and other stakeholders across the Federation, in an online/ off-line mode.

4) Output:

In developing the funding formula for Stream 1, the consultant selected for this assignment will need to ensure a clear linkage of the new resource allocation formula for the stream with IPPF’s strategic framework, giving due weightage to the most marginalized and vulnerable communities, difference in the scale, complexity, and types of member

associations, unmet needs and their measurement criteria, especially in the context of work undertaken by IPPF with a large adolescent population and other such criteria that could be taken on board for the resource allocation formula by IPPF.

As part of this assignment, the consultant needs to come up with the following broad outputs:

- a) Design a consultation process for the development of a new resource allocation formula;
- b) Develop a resource allocation formula along with performance assessment methodology under Stream 1;
- c) Develop implementation guidelines for roll out of the resource allocation formula;
- d) Draft implementation guidelines for Streams 2 and 3 in close guidance with the IPPF Resource Allocation Support Team;
- e) Propose a strategy for dissemination and internal communication along with developing training/presentation packs for dissemination and roll out of the new resource allocation formula.

5) Reporting Lines

The consultant will report to the Resource allocation Support Team, though its lead and/or any other designated person in the team.

6) Submission of Proposal

- a) The consultants/ firms interested in submitting their proposals should do so in the following format

#	Particulars	Details
1.	Firm/ Consultant details	Firm/ Consultant should provide details of their: <ul style="list-style-type: none"> • Registered office address; • Service portfolio; • Pool of skill sets available.
2.	Firm/ Consultant's experience	Provide the details of relevant experience that best illustrate ability to provide the services required as per the scope of work (above). (Highlight a few examples of similar work undertaken in the past 3 years).
3.	Approach & Methodology proposed to be undertaken	Provide overall approach & methodology to cover the details provided in the scope of work above, which include: <ul style="list-style-type: none"> • Understanding of the requirements of IPPF; • Overall approach and its responsiveness to the objective; • Methodology to be adopted to undertake the scope of work; • Key risks and mitigation strategies to be put in place.
4.	Proposed resource/team members.	Provide brief bios and detailed CVs of list of personnel to be deputed exclusively for IPPF project.

b) Financial Quote

The financial quote should be provided in the table below:

Particulars	Amount (£) Excluding VAT	VAT as per the current rate applicable	Total Fee (£)
	(A)	(B)	(C)=(A)+(B)
Gross Annual Fee		VAT (... %) VAT (... Amount)	

Expenses, if any, will be reimbursed to the selected firm only in case they need to travel outside of the country, based on actual costs subject to the overall limits provided within the IPPF travel policy.

7) Payment Terms

The amount shall be payable to the selected firm, linked to specific deliverables once every quarter.

S.No.	Milestones	Payment Terms
1.	Signing of the Contract	10% of the fee
2.	Submission of draft recommendations (i.e. in line with the deliverables provided above)	25% of the fee
3.	Approval of recommendations by the Governing council/ Board of Trustees	45% of the fee
4.	Submission of presentation and dissemination packs for IPPF	20% of the fee

8) Timelines

The Timetable for the tendering process is as provided below:

Date	Proposed Milestone
31 st January 2020	- Floating Invitation to tender online
07 th February 2020	- Receipt of Proposals
10 th February 2020	- Presentation by shortlisted firms to resource allocation working group
12 th February 2020	- Selection and contracting completed

9) Submission of proposal

Please submit your bids/ proposal online at tenderinfo@ippf.org.

The Proposals must be received by IPPF in the requisite format at mentioned email not later than 5 PM (GMT) on Friday 7th February 2020.

Note: The proposal in response to this tender must be submitted within the timeline presented above.