**ToR - Expert on Developing Organizational and Fundraising Strategies for the Next 5 Years**

**Background:**

Equidev is an international public organization providing expert development solutions and technical support to advance sustainable development and equitable growth in Central Asia.

We are a new, independent organization, originally founded by Oxfam Great Britain (Oxfam GB) —a leading global charity fighting inequality, poverty and injustice. Equidev partners with bilateral and multilateral agencies, governments, not-for-profit organizations, social enterprises and the private sector. It is registered as a non-profit international organization under Tajik legislation in February 2021.

Headquartered in Dushanbe, Tajikistan, Equidev offers a range of consulting, advisory and implementation support services across diverse socioeconomic development sectors and practices. Driven by our core values—equity and justice for all, with an unwavering commitment to positive impacts—and powered by cutting-edge innovation, we offer integrated solutions for complex development problems that confront developing economies in the region. Equidev is expertly mentored by Oxfam GB, which will continue to support Equidev in setting up its robust strategic and operational base in the region through investments in capacity, network and assets over the coming years.

For further information see [www.equidev.info](http://www.equidev.info)

Equidev is embarking on a strategic planning process to define its direction and priorities for the next five years. The purpose of this ToR is to outline the tasks and responsibilities involved in developing the strategic plan.

**Objective:**

The primary objectives are:

1. Formulate a comprehensive and actionable strategic plan that guides Equidev's activities and initiatives over the next five years, aligning with its mission, vision, and organizational goals.
2. Create a systematic and efficient donor screening process that helps Equidev identify and engage with potential donors who are aligned with its mission and goals. By implementing a structured approach, Equidev intends to ensure that the process is not only repeatable and scalable across different regions and donor segments but also capable of adapting to evolving fundraising landscapes and organizational needs. This strategic alignment between potential donors and Equidev's mission and goals is crucial, as it ensures that both the organization and its supporters are working synergistically toward sustainable development and poverty reduction in Central Asia.

**Scope of Work for Objective 1:**

* Conduct a comprehensive review of Equidev's current strategic plan, organizational structure, programs, and external partnership and funding environment, as well as socio-economic trends in Tajikistan.
* Engage with key stakeholders, including board members, staff, partners, donors, and beneficiaries, to gather input and insights on organizational priorities and challenges.
* Analyze internal strengths and weaknesses, as well as external opportunities and threats, through tools such as SWOT analysis.
* Define clear strategic objectives and goals for Equidev's growth and impact in the next five years.
* Develop a results framework with key performance indicators (KPIs) to monitor progress and evaluate the effectiveness of the strategic plan.
* Draft the strategic plan document, outlining strategic objectives, action plans, timelines, responsible parties, and resource requirements.
* Facilitate consultations and workshops with Equidev senior management and board members to review and refine the draft strategic plan. Finalize the strategic plan based on feedback and approval from key stakeholders.

**Scope of work for Objective 2:**

* Review existing donor database and fundraising materials to understand past fundraising efforts.
* Conduct research on potential donors, including governmental agencies, private foundations, corporations, and individual philanthropists.
* Desk research and interviews to receive more insight into fundraising from other CSOs and donors working in the same field.Analyze donor profiles and assess their alignment with Equidev's mission, vision, and strategic priorities.
* Create a structured framework for screening and categorizing potential donors based on relevance, capacity, and willingness to support Equidev's initiatives.
* Identify new donors as well as expanding the existing list of prospects, and more specifically Identify potential donors who support programs that are in line with Equidev’s goals.
* Identify and analyze current and past donors and partnership/funding agreements or practices. Draft guidelines and procedures for implementing the donor screening strategy.
* Collaborate with relevant stakeholders, including senior management, fundraising team, and program managers, to gather input and ensure alignment with organizational objectives.
* Present the proposed donor screening strategy to senior management for review and approval.
* Help develop programmatic/project ideas in strategic areas that are newer. Define CBM’s needs, fundraising priorities and goals, in view of the current situation and CBM’s organizational strategy.
* Utilize data analytics to enhance the understanding of donor behavior and trends, which can inform more targeted engagement strategies.
* Establish a feedback mechanism with past and current donors to evaluate their satisfaction and gather insights on improving donor relationships. This can help in refining engagement strategies and improving donor retention by directly addressing their needs and preferences.
* Implement a continuous improvement plan for the donor screening process, which includes regular reviews and updates to the screening criteria and processes based on evolving market dynamics and organizational priorities. This ensures that the screening process remains relevant and effective in meeting the changing landscape of donor interests and organizational growth.

**Deliverables:**

* Review report summarizing findings from the environmental scan and stakeholder consultations.
* Strategic plan document outlining Equidev's vision, mission, values, strategic objectives, action plans, and monitoring framework for the next five years.
* Presentation slides summarizing the strategic plan for dissemination and communication purposes.
* Detailed report on potential donors, including profiles, analysis, and recommendations.
* Criteria and metrics for donor evaluation and prioritization.
* Framework for screening and categorizing potential donors.
* Guidelines and procedures document for implementing the donor screening strategy.
* Presentation slides summarizing the proposed strategy for senior management review (BoDs and CEO)
* Training for EQUIDEV staff on donor screening and retention methodology

**Timeline:**

The development of the Equidev strategy including fundraising strategy for the next five years is expected to be completed within **July-October 2024,** with regular progress updates provided to the board and senior management. Availability to travel to Tajikistan. (7-10 days)

**Budget:**

The budget for this project will cover consultant fees, stakeholder engagement activities, research materials, and other related expenses. A detailed budget proposal will be submitted for approval before the commencement of the project.

**Reporting and Coordination:**

The Consultant will report to CEO of Equidev. Regular coordination meetings will be scheduled to track progress, address any challenges, and ensure timely completion of deliverables.

**Evaluation:**

The success of this project will be evaluated based on the extent to which the strategic plan aligns with Equidev's mission and objectives, as well as its effectiveness in guiding organizational decision-making and resource allocation.

**Confidentiality:**

All information obtained and discussed during the development of the strategic plan shall be treated as confidential and used solely for the purpose of this project.

**Approval:**

This Terms of Reference requires approval from the board of directors before the commencement of the project.

**Required Skills and Competencies**

1. **Strategic Planning:** Ability to develop comprehensive strategic plans that align with the mission and goals of the NGO, considering both short-term and long-term objectives.
2. **Understanding of NGO Sector**: In-depth knowledge of the non-profit sector, including understanding of key challenges, trends, and best practices in program implementation, advocacy, and fundraising.
3. **Fundraising Expertise**: Proficiency in designing effective fundraising strategies, including grant writing, donor cultivation, crowdfunding, and major gifts solicitation.
4. **Financial Acumen:** Strong understanding of financial management principles related to NGOs, including budgeting, financial reporting, and resource allocation.
5. **Analytical Skills**: Capacity to analyze data, assess organizational strengths and weaknesses, and identify opportunities for growth and improvement.
6. **Stakeholder Engagement**: Ability to engage with diverse stakeholders, including donors, partners, board members, and community members, to build strong relationships and collaborations.
7. **Communication Skills**: Excellent written and verbal communication skills, with the ability to articulate complex ideas clearly and persuasively to various audiences.
8. Excellent spoken and written English and at least a good understanding of Russian. Fluency in Russian would be a strong asset.
9. **Cultural Competence**: Sensitivity and awareness of cultural differences, and the ability to work respectfully and effectively with individuals from diverse backgrounds.

**Deadline and submission of expression of interest**

If you are interested in supporting our strategy development and meet the criteria, please send us your application via email at equidevjobs@equidev.info with the subject reading “**Developing Organizational and Fundraising Strategies for the Next 5 Years**” no later than **10.06.2024** (COB). Your application package should include:

* Expression of interest indicating your understanding of the assignment and relevant skills and experiences with the fundraising strategy development, including the CVs of all engaged.
* Proposed methodology and related timeframe. In case you are applying as a team of consultants your methodological offer should also clarify how you will divide the work.
* Financial proposal comprising detailed quotation for the assignment, showing working days and expected fee.

*Due to the urgency of this role, we may be reviewing applications and interviewing candidates in advance of the closing date. For this reason, interested candidates are asked to submit their application as soon as possible.*