

Call for Expression of Interest for Consultancy Services

EFC Operations Professionals Network (OPN) benchmarking project

The Operations Professionals Network (OPN) of the European Foundation Centre (EFC) is seeking an associate consultant to provide intermediary support to its benchmarking activities across key operations domains.

Background

OPN is a European-level peer-learning and support network of 14 international foundations. It provides a safe space for learning, exchange and discussion on key finance, IT, administration, operational, HR, legal, and capacity development issues foundations are facing.

Participating foundations: Bernard van Leer Foundation; Children's Investment Fund Foundation; Fondazione Compagnia di San Paolo; European Climate Foundation; Fundação Calouste Gulbenkian; IKEA Foundation; Jacobs Foundation; King Baudouin Foundation; Luminate; Oak Foundation; Porticus; Robert Bosch Stiftung GmbH; Trust Africa; Wellcome Trust.

The OPN network is hosted by the European Foundation Centre (EFC), which is a leading platform for philanthropy in Europe that works to strengthen the sector and make the case for institutional philanthropy as a formidable means for effecting change.

Working closely with its members, a dynamic network of strategically-minded philanthropic organisations from almost 30 countries, the EFC:

- Fosters peer-learning by surfacing the expertise and experience within the sector
- Enhances collaboration by connecting people for exchange and joint action
- Advocates for favourable policy and regulatory environments for philanthropy
- Builds a solid evidence base through knowledge and intelligence
- Raises the visibility of philanthropy's value and impact

The benchmarking project

Initiated in 2018, the benchmarking project aspires to establish a solid base of comparable information on a key range of indicators at the nexus of philanthropic programmatic output and operations (e.g. annual grantmaking output, average grant size, amount under management per programmatic FTE, travel costs, salaries, office costs etc). In addition to surfacing valuable comparative information to inform decision making, the project aspires to trigger rich discussions unpacking the principled and strategic considerations that drive the numbers. Among the 14 OPN peer organisations, there are areas of convergence but also singularities shaped by the context, organisational make up, and mandate, as some organisations are purely grantmaking entities, while other peer organisations both make grants and operate their own projects.

Significant strides were made in the first two iterations of the project, and now the participating organisations seek professional expertise to help attain their further objectives.

Responsibilities and deliverables

The consultant will be responsible for undertaking the following activities and producing the corresponding deliverables

Responsibilities	Deliverables
Create sharper definitions for key indicators to improve comparability	A glossary with sharp definitions for the key indicators of the benchmarking categories
Build narrative per foundation around organisational structure and profile	A brief report with organisational structure narratives for OPN members, which will also be capturing key organisational information (e.g. type of foundation – operating, grantmaking, hybrid; operating geographies; whether the organisation is endowed or connected to a business etc.)

Refine data points with each foundation	na
Deep dive into one or more priority categories covered by the project (e.g. salaries, travel, office costs)	A brief report unpacking the policies and underlying principles driving a certain category that will be identified by the group
Ensure a standard, more visual way of presenting the data	A high-quality, visual presentation of key project data, which can be used as a template for future iterations
Determine how members can engage with the output and use findings to recalibrate scope	A one-pager with key recommendations
Create templates for data collection and reporting	Standard template for data collection and reporting (online solutions should be explored)
Suggest better processes for data collection and reporting	A one-pager with key recommendations
Assist in the deliberative process over the future of the project	A list of viable options for the future of the project, ranging from entirely member-driven processes to outsourcing

The OPN Secretariat will be the key point of contact for the consultant throughout the project, and each of the 14 peer organisations will appoint a point person for the project. A working group will be established, which will be tasked with making executive decisions about the project.

Timeframe and key deliverables

Date	Tasks and deliverables
March 5	Deadline for proposal submission
April 20	Finalisation of data collection template, glossary with key definitions, and organisational narratives
May 20	Completion of data collection
June 14	Presentation of key findings and deep dive into a topical areas that will be identified by the group
June 21	Submission of final presentation, brief report on topical areas, recommendations for further improvement on how members could better engage with the output, and process management.

Requirements

The consultant should have

- 3-5 years of consulting experience
- Significant experience in project management / delivery, and the related stakeholder management
- Experience developing complex surveys and benchmarking
- Good knowledge of global philanthropy
- Excellent problem-solving / analytical skills
- Track record of delivering quality work in similar projects
- Collaborative, relationship and influencing skills with a broad set of stakeholders
- Driven, organised, results-oriented
- Excellent English writing and oral communication skills
- Advanced knowledge of Excel and PowerPoint

Application

Qualified and interested parties are asked to submit a proposal demonstrating a thorough understanding of the ToR and include

- Consultant/company profile
- Demonstrated previous experience in similar assignments
- Description of the methodology
- Financial proposal, as a lump sum (in EUR) including expert fee and all costs for travelling or other activities related to the performance of the task assigned. A breakdown in sub-categories of the lump sum is required.

This is not a full-time engagement – we envisage the consultant to provide support two days per week for a three-month period (mid-March to mid-June 2021).

All submissions, questions, comments, requests for clarifications must be sent to soikonomou@efc.be before **5 March 2021**.