Answers to Tender Questions

■ **Tender name:** Consultant Services for Designing an Operational Handbook for the Help Localisation Facility

■ **Reference number:** PGLO-001-24-25-10

■ **Date of submission:** 04.06.2025

If your submitted questions were not answered, please reach out to krey@help-ev.de.

1. Page 2 of Annex 1 (ToR) distinguishes the development and the project strand of the HLF program. It is my understanding that the ToR scope of work only pertains to the HLF funding processes which take place under the project strand of work (i.e. no documentation or handbook is developed for the Steering Committee). Could you confirm this interpretation?

   Answer: The handbook is formally part of the Development Strand and aims to document and standardize the operationalization of the Project Strand. While no handbook is developed specifically for the Steering Committee, their strategic oversight and decision-making role is reflected in the governance and procedural aspects of the documentation.

2. Page 5 of Annex 1 (ToR) notes Additional Tasks by the Consultant. Could you clarify if these additional tasks should be priced into the financial offer or be provided as a separate (Additional) budget line? Similarly: may I include suggestions for other deviations/add-ons where I see these as being valuable and relevant.

   Answer: Yes, please include all tasks—core and additional—in your financial offer. A breakdown of the financial offer will be appreciated. We also warmly welcome relevant suggestions for value-added components or adaptations in your proposal. Your expertise and creativity in shaping a high-quality output are appreciated. Please elaborate them further in the Technical Offer (2. Methodology, Approach and Timeline).

3. Page 5 of Annex 1 (ToR) notes a 5-page limit on the technical offer. Does this apply to all 3 components listed cumulatively or separately? It would be quite tight if it is a limit on all 3 components cumulatively. I would kindly request if I may submit max 5 pages for component (2) Methodology, approach, timeline and another max 5 pages for (1) Experience and Expertise and (3) Personnel Concept together (excluding sample references in annex)

   Answer: Slight deviations from the page limit will be accepted. Please ensure that your proposal addresses only the requested criteria and avoids unnecessary repetition, particularly in relation to the Terms of Reference (ToR). Additionally, your staffing concept and description of previous experience should focus exclusively on elements that are directly relevant to this call for proposals. References or sample documents may be submitted as annexes and do not count toward the page limit.

4. The manner in which manuals, guidelines and tools for operation are designed will depend on the operating systems in use by Help and her local partners. Could you clarify whether the choice for Microsoft Office, Google Suite, or otherwise has already been made or whether making an informed choice is part of the assignment.

   Answer: Help and its partners currently use Microsoft Office as the main platform (especially Word, Excel, and PowerPoint), in addition to three Softwares (Good Grants for Grant Management, TolaData for Data collection, WINPACCS for Accounting). All templates should

have this form, as we do not plan to introduce an additional tool. However, recommendations for improvements are welcome within the scope of your assignment.

5. **Existing Materials & Processes**
   5.1. Could you confirm which existing documents, templates, and workflows (particularly from the Ukraine pilot) will be made available?

Answer: The consultant will receive access to all materials that will have been developed by the time the consultancy starts. They are currently in technical development, but the consultant will be responsible to established common layout and formats, and do fine-tuning, alignment and completion; in exchange with the HLF-Team. This will include but is not limited to financial, MEAL, programmatic reporting templates and guidance documents. They will serve as a strong foundation to build from, so the wheel does not need to be developed from scratch.

   5.2. Are there any standard operating procedures (SOPs) or draft tools already in use that the consultant will be expected to build upon?

Answer: Yes, several SOPs and draft tools exist or are currently in development by the teams. They offer an excellent starting point for adaptation and integration.

6. **Structure and Scope of Manuals**
   6.1. The ToR refers to several manuals totaling 30–40 pages (each manual consisting of 5–15 pages depending on the topic), excluding the templates. Could you clarify which manuals are referred to?

Answer: The main structure anticipates manuals aligned with the three key funding phases: Application (Registration, Due Diligence and Dialogue) and Selection, Implementation, and Closure. These will include guidance on admin (financial, procurement, HR), programming and MEAL topics, as well as capacity strengthening. The aim is to provide local partner organisations with a guidance of what is expected by them throughout the whole process in the HLF.
This includes, but is not limited to, proposal writing, reporting, data collection, fund request processes, monitoring, closure procedures, and audit preparation. Cross-cutting topics are treated either as integrated modules or stand-alone sections, depending on their complexity. The consultant is expected (after a first introduction phase) to suggest the most suitable structure and a decision will be taken then jointly with the HLF-Team.

   6.2. Are these manuals expected to follow the three funding phases (Application, Implementation, Closure) exclusively, or will cross-cutting themes (e.g. safeguarding, MEAL, compliance) be treated as separate manuals or (as we would suggest) as integrated sections?

Answer: Your suggestion aligns well with our approach. While the structure is phase-based, we support integrating cross-cutting themes (e.g., safeguarding, MEAL, gender, compliance, and PSEA) either as dedicated sections or embedded components, as long as they are clearly visible and actionable. As mentioned above, the structure is not set in stone, and the aim is to build on suggestions made by the consultant, and approved by HLF-Team.

7. **Stakeholder Engagement**
   7.1. To help estimate the number and type of data collection methods needed, could you indicate how many stakeholder groups or individuals are expected to be involved throughout the consultancy?

Answer: During the content development, we anticipate engagement with Help's international and country-level staff. There will be close coordination, meetings once or twice per week in the beginning, and several feedback loops are expected until documents are finalized. For the first

weeks, availability of the consultant should be ensured. Other stakeholders will get involved when the training sessions take place, and they will consist of the grants committee and representatives of local civil society. This can be organized in 1 or 2 days, online. HLF-Team will provide the stakeholders, the consultant does not have to identify them.

During the development, additional sessions (KII od FGD) might be organized with local civil society if needed. However, the feedback and suggestions for the revision cycle will be the focus.

7.2. Will Help facilitate access to these stakeholders (e.g. Committees, local partners), or should the consultant arrange engagement independently?

Answer: Help will facilitate introductions and access to all relevant stakeholders, including local partners and internal staff and will participate in any meetings.

8. **Language and Format**
   8.1. Will the entire consultancy be conducted in English, and is the handbook required in English only?

Answer: Yes, English is the working language for the consultancy. The final handbook is required in English. However, we foresee a future translation into Ukrainian, which will be handled separately.

8.2. Are there any expectations for editable or interactive formats beyond the PDF and PowerPoint (e.g. online templates, digital toolkits)?

Answer: Help and its partners currently use Microsoft Office as the main platform (especially Word, Excel, and PowerPoint), in addition to two Softwares (Good Grants for Grant Management and TolaData for Data collection). All templates should have this form, we do not plan to introduce an additional tool. However, recommendations for improvements are welcome within the scope of your assignment.

9. **Use of the PowerPoint Presentation**
   9.1. Should the PowerPoint be designed primarily for internal training/onboarding, or also for external communication purposes (e.g. donors or partners)?

Answer: The PowerPoint is primarily for internal onboarding and training of partner staff, but it should be polished and professional enough to be shared with donors or partners if needed.

10. **Global Applicability**
    10.1. Should the handbook already include guidance on adaptation for contexts beyond Ukraine, or is this intended for future development phases?

Answer: Yes, the handbook should be designed for global applicability. While Ukraine serves as the initial use case, adaptability to other contexts is a core part of the consultancy. Concrete suggestions of sections to be adapted to different contexts are highly appreciated during the development, as a preparation for a global applicability.

11. **Budget**
    11.1. In order to prepare realistic technical and financial proposals, could you please indicate a budget range or financial ceiling we should take into account (even a ballpark figure)?

Answer: While we cannot disclose an exact ceiling, we recommend aligning your budget with typical consultancies of similar scope for international NGOs, based on an estimated 50–70 working days. We expect the consultancy to be carried out by an individual or small team rather than a large group. Competitive and cost-conscious offers are appreciated.

12. **Estimated Workdays and Timeline Flexibility**

12.1. Could you also share the estimated number of working days expected for this consultancy?

Answer: Approximately 50 to 70 working days is a reasonable estimate. However, the consultancy will be paid on delivery of the output and not on the days worked.

12.2. Are the proposed timelines fixed, or is there flexibility depending on coordination with stakeholders and the feedback cycles?

Answer: There is flexibility to adjust the timeline in coordination with HLF-Team. While we aim to stay on track, quality and participatory engagement take priority.

13. Can I share documents that were produced during an employment and not during a consultancy, as some of them were co-created and I developed others?

Answer: Absolutely. You are welcome to include co-authored or job-based outputs as part of your portfolio, with a clear explanation of your contribution. These are valuable indicators of your experience and capacity.

14. For the final report and manuals, if we want to have them edited professionally and designed at the proposal stage, should we include the CVs of individuals or just the role descriptions and their associated costs within a specified timeframe?

Answer: Please include role descriptions and estimated costs in your proposal. If you already have someone identified, you may optionally add their CV as well.

15. Would you recommend we still apply despite not having deep knowledge of Ukraine?

Answer: Yes, we encourage you to apply. Your strong expertise in localization, equitable partnerships, and global tools is highly relevant to the HLF's vision. Experience in Ukraine is an advantage, but not a requirement.

16. Does the project have a budget ceiling?

Answer: While we cannot disclose an exact ceiling, we recommend aligning your budget with typical consultancies of similar scope for international NGOs, based on an estimated 50–70 working days. We expect the consultancy to be carried out by an individual or small team rather than a large group. Competitive and cost-conscious offers are appreciated.

17. Are all activities expected to be conducted virtually, or is any travel required?

Answer: All activities, including stakeholder engagement, kick-off meetings, and presentations, can be conducted virtually. No travel is required or expected.

18. In what format is the final handbook expected—should it include professional layout/design?

Answer: The consultant should submit a finalized version in MS Word, no professional designing software is expected. It should have a user-friendly layout, Documents must be aligned with Help's branding (e.g. logo, colors, formatting).

19. How many templates do you envision will be attached to each manual? Is it 2-4, 5-10, 10-20?

Answer: It will depend on the Phase but should be around 10-15 Templates per manual. The templates are mostly already available and just need some formatting and you need to ensure the alignment within the whole process.

20. How many templates currently exist that you expect the consultants to adapt and integrate into each manual? 5? 10? 20? More?

Answer: Most templates already exist or are in a development phase. The consultant in almost all cases, will not have to develop completely new templates.

21. How many templates do you anticipate the consultants will need to create from scratch, where none currently exist? Again, an approximate range per manual would be helpful, as creating a larger number of new templates significantly affects the time and budget required. 5? 10? 20?

Answer: As mentioned above, the HLF-Team is not expecting the consultant to develop completely new templates but to build on the existing ones. The manuals though, need to be written from scratch, with input from the HLF-Teams.

22. We understand that the handbook may be based in part on processes piloted or implemented in Ukraine. To assess what content can be adapted versus what must be developed from scratch, are there any existing materials—such as documents, slide decks, or videos—that describe the HELP funding process? If so, could you kindly share any available links or attachments?

Answer: Please refer to the information submitted on the website: https://help-ukraine.org.ua/en/projects/help-localisation-facility-hlf/

We look forward to your proposals.