

Terms of Reference: Consultant Services for Designing an Operational Handbook for the Help Localisation Facility

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Programme Title: Help Localisation Facility

Programme Region: Global

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1. Context & Background

Help – Hilfe zur Selbsthilfe is a humanitarian, non-governmental, nonprofit organization founded in 1981, working in around 20 countries throughout the world, including in Ukraine.

Local and national organisations play a vital role in crisis response but face barriers to funding, compliance, and capacity development. True localisation as aimed for by the Grand Bargain requires shifting power and decision-making to local actors, yet progress remains insufficient. To address this, the **Help Localisation Facility (HLF)** —funded by the GFFO and co-implemented by Help— will establish **an innovative, participatory global funding instrument**. This initiative enables local and international civil society organisations to actively shape and manage a localised funding mechanism, reinforcing trust, capacity-sharing, and meaningful partnerships. The pilot-phase of the HLF Programme is taking place in Ukraine.

The HLF will spend through local partners around 10.8 million euros directly on local organisations’ projects, their organisational capacity strengthening and structural costs.

The HLF takes place in the pilot region Ukraine, a country deeply affected by an ongoing conflict and its humanitarian consequences.

The HLF runs from Nov 1, 2024 to Dec 31, 2026.

The objective of the HLF is to strengthen the role of local civil society in humanitarian action through addressing systemic challenges in localisation (1) by creating an innovative and participatory global funding instrument in equal partnership with civil society and (2) by supporting local actors through grants and capacity development.

The impact of the HLF will be to strengthen local and national civil society actors, who gain agency and voice, share mutual responsibility and accountability, and access quality funding more directly. After the partnership with the HLF, the organisations will be more sustainable, strategic, and robust in designing high-quality humanitarian projects with and for people in need.

The vision of the HLF Together we are building a foundation for a stronger, more efficient and more equitable humanitarian system to sustainably overcome hardship, poverty, and social injustice for people in need. A humanitarian system:

- where meaningful and trusting partnerships on equal terms between its actors are the key to overcoming widespread power imbalances to the disadvantage of local and national actors.
- in which the expertise and lived experience of national and international civil society actors are truly recognized, respected, and incorporated in all aspects of humanitarian work.

The HLF Program is structured into two interconnected components:

1. **Development Strand:** This strand involves designing an innovative and participatory global funding instrument with less bureaucratic hurdles for local partners ("less paper/more aid"). This involved establishing a Steering Committee on global level and a Grants Committee on local level, to take part in the development of processes for the selection of projects funded by the HLF in the future.
2. **Project Strand:** This strand involves providing access to the innovative and participatory global funding instrument for local partners through the participation of local civil society actors as part of the Grants Committee. The Grants Committee will select the projects to be funded. All grants will allow for capacity development; additionally, Help will offer capacity enhancement support according to capacity development plans developed together with the partners.

The Steering Committee is composed of representatives from international civil society organizations and networks, the German Federal Foreign Office (GFFO), and Help. The primary responsibilities of the Steering Committee include defining eligibility and funding criteria, determining potential sectoral priorities, and establishing quality and success benchmarks for the funding instrument. **The Grants Committee is composed of** representatives from local civil society organizations and networks, as well as Help. The primary responsibilities of the Grants Committee include actively supporting the HLF funding instrument for a specific target region by co-developing selection criteria for projects. Subsequently, the Grants Committee is responsible for allocating grants from the HLF funding instrument to local projects based on the established criteria. This structure reduces bureaucratic hurdles for local organisations to receive funding, while enabling civil society organisations to exercise direct decision-making power over the funding instrument and allocation of grants to local organisations.

The local partners funded by the HLF will run through a **HLF funding process**, which is in short: (1) Application and Selection Phase, (2) Implementation Phase and (3) Closure Phase.

A consultant is required to develop a comprehensive handbook for the HLF funding process with a global perspective, ensuring it can be adapted for use in multiple countries and regions beyond Ukraine. The consultant will collaborate with relevant stakeholders to ensure the handbook's content is clear, user-friendly, and aligned with HLF's goals.

2. Objectives of the Consultancy

The objective of this consultancy is to develop a comprehensive handbook for the HLF funding process, consisting of various manuals that cover key processes and relevant cross-cutting themes of the HLF

funding process. The handbook will be designed with a global perspective, ensuring it is adaptable for use in Ukraine and can be easily scaled to other regions. It will provide a clear, user-friendly, and standardised framework for local organisations applying and participating in the HLF funding process, incorporating visualisations, step-by-step explanations, templates, and other instructions to guide applicants and recipients through each phase of the process. The consultant will collaborate with relevant stakeholders, including local partners and the HLF team, to ensure the handbook aligns with HLF's goals and local needs. After finalisation, review cycles will be conducted with stakeholders to incorporate feedback and refine the materials, ensuring they achieve the desired outcome and effectiveness.

3. Scope of Work

The consultant will develop **a comprehensive handbook for the HLF funding process**, which will consist of several manuals covering key processes and relevant cross-cutting themes in the HLF funding cycle. The handbook must be logically structured for easy navigation, visually accessible with clear formatting, and written in a user-friendly manner suited to the intended audience. To achieve this, the consultant will:

- Design **process-specific manuals for each phase of the HLF funding process**, including (1) Application and Selection Phase, (2) Implementation Phase and (3) Closure Phase. These manuals will provide step-by-step instructions, standardised templates, and practical tools to guide local organisations through the application and funding process.
 - o Ensure the **inclusion of cross-cutting themes** such as donor compliance, financial accountability, safeguarding, risk management, and MEAL (Monitoring, Evaluation, Accountability, and Learning), embedding them within the relevant manuals or as dedicated sections where needed.
 - o Develop **user-friendly visual elements**, such as process workflows, infographics, and real-world examples, to improve accessibility and engagement.
 - o Adapt and integrate **existing templates** provided by Help, ensuring they are standardised, easy to use, and aligned with HLF requirements. Where no templates exist, propose and develop new ones.
 - o Ensure the handbook is aligned with a **global perspective**, making it adaptable to other country contexts while maintaining flexibility for local implementation.
 - o Engage with **HLF stakeholders** (including Help's HLF Team, local partners, the Grants Committee, and relevant technical experts) to gather input, validate content, and refine the handbook through structured review cycles and feedback loops.
 - o Conduct **practical testing** of selected handbook components with local partners to ensure clarity and usability before finalisation.

Timeline and Collaboration

The consultant will collaborate closely with Help's HLF Team, local partners, The Committees, and all other relevant stakeholders throughout the process to ensure that the handbook meets both the specific needs of Ukraine and the scalability requirements for other regions.

Responsible Parties: The consultant will be overseen and managed by the HLF Programme Management and Coordination, the HLF Programme Management and Controlling and the Global MEAL Coordinator. They will be the primary points of contact for the consultant and will ensure regular communication and coordination throughout the consultancy.

Location: The consultancy will be conducted entirely remotely. The consultant is expected to have access to a stable internet connection and the necessary technical setup to facilitate virtual meetings with webcam effectively.

The development of the HLF Handbook will follow a structured process with key milestones:

Key Milestones	Task / Deliverable	Target Dates	Review and Approvals Required
(1) Content development & drafting	Kick-Off Meeting Initial meeting to align expectations and confirm timeline: Presentation of methodology by consultant, clarification of questions with HLF team.	Mid June 2025	Help HLF Team
	Development of Manuals Creation of the individual manuals, incorporating existing materials and conduct regular feedback loops with Help's HLF Team. Consultations with stakeholders to ensure clarity and usability.	July – September 2025 (2-3 months)	Help HLF Team, Local partners, Committees
(2) Finalisation	Finalisation and Training Session Include all templates and compile with the manuals into a handbook, ensuring a logically organised structure and accessible format. Provide a Power Point Presentation on the handbook. Present the Power Point Presentation and all Templates to key users.	Beginning of October 2025	Help HLF Team
(3) Revision cycle	Collection of Feedback & Revision Collection of feedback from stakeholders and revision of the handbook.	From November 2025 to January 2026 (Due date: End of January 2026)	Help HLF Team, local partners, Committees

4. Expected Outputs

The consultant is expected to provide the following outputs:

1. Comprehensive HLF Handbook

- Consisting of several Manuals covering all Phases of the HLF funding process.
- Standardised templates for all steps of the HLF funding process.
- Visual aids such as diagrams and flowcharts to simplify complex processes.
- Clear formatting and user-friendly language to ensure accessibility.
- Total length should be 30-40 pages (each manual consisting of 5-15 pages depending on the topics), excluding the Templates.
- Provision of a final revised HLF Handbook after the Revision Cycle

2. PowerPoint Presentation on the HLF Handbook

- A structured slide deck providing an overview of the handbook's purpose, and key instructions for each manual.
- Designed for the HLF Team to use for introductions to new partners.
- Provision of a final revised Presentation after the Revision Cycle

3. A progress and final report about the consultancy process and coordination

- Submission of a short **progress reports** summarizing the level of accomplishment of the deliverables, challenges, and recommendations after finalisation of the handbook (before the revision)
- Development of a **final report**, summarizing achievements, key decisions, lessons learned, and recommendations for future improvements.

Additional Tasks by the Consultant

4. Revision Cycle based on Stakeholder Feedback

- A revision following consultations with Help's HLF Team, the Grants Committee, and local partners after the first funding phase

5. Training Session on the HLF Handbook

- A session (online or in person) to introduce the handbook to key users.
- Overview of its structure, key processes, and how to use the templates effectively.

5. Personnel Concept & Required Qualifications

The consultancy can be conducted by a single individual or as a team effort/company.

The following qualifications are required to successfully conduct the assignment:

- Minimum 5 years of professional experience in humanitarian or development contexts, with a focus on localisation or partnership models
- Proven track record of authoring operational handbooks, manuals, or toolkits (samples must be provided) for international or national Organisations
- Strong skills in translating complex procedures into clear, user-friendly documentation.
- Experience in engaging local stakeholders, including through interviews or validation workshops.
- Demonstrated ability to deliver structured consultancy outputs on time, including managing review and feedback loops.
- Excellent English writing skills (C1/C2 level); German language skills are an asset.
- Ability to work independently and collaboratively with international and local teams.

6. Technical and Financial Offer & Interview

Applicants are required to submit both a technical and a financial offer. Help will carefully review and evaluate these offers, considering the quality of the proposed methodology, the consultant's relevant experience, and the competitiveness of the financial proposal. Based on this evaluation, shortlisted candidates will be invited for an interview to further assess their qualifications, proposed approach, and fit for the assignment.

The **Technical Offer** should include (maximum 5 pages):

1. Experience & Expertise

- Overview of relevant experience and expertise with regard to the above qualifications.
- Specific examples of past projects in handbook/manual development, process design, and localization approaches.

2. Methodology, Approach and Timeline

- Explanation of how the consultant will implement the assignment based on the provided scope of work and timeline.
- Approach for structuring and developing the handbook, including templates, visualisations, and user-friendly formatting.
- Strategy for gathering and integrating stakeholder feedback throughout the process.
- A time frame including Kick-off, stakeholder engagement, delivery of the first handbook version, completion of the revision cycle and interim and final reporting.

3. Personnel Concept

- For individual applicants: Confirmation that they will execute all tasks and explanation of how they ensure expertise in handbook development, stakeholder engagement, and project management (submission of CV).
- For teams/companies: Description of team members, their respective roles, and task distribution for efficient implementation.

Note: Applicants must also provide **at least two samples** of previous work (e.g., handbooks and manuals) as separate attachments. References should be listed in the “Proposal Submission Form.”

The Financial Offer should be submitted in the “Proposal Submission Form”, containing a description of the services and the corresponding amount in euros, which adds up to a total amount (lump sum). The daily rate in euros of the bidder or the bidder members should be made visible.