

## Call for Consultants To draw up a Finance Strategy for CONCORD

CONCORD, the European Confederation of NGOs working on international cooperation and sustainable development, representing more than 2,600 NGOs, is seeking to recruit a consultant to develop a finance strategy as part of its efforts to improve its responsible governance and in particular improved foresight.

### Background

CONCORD is a member-led Confederation with a vision to contribute to creating equal, just and inclusive societies in a sustainable world. We will achieve this through transforming systems and power structures, focusing on the EU and its policies, programming and other activities as regards its partner countries around the world.

In 2022, CONCORD adopted a [new strategy for the period 2023-2026](#), inclusive. While not fundamentally changing what CONCORD works on, it promises considerable improvements in ways of working, with a greater focus on advocacy and communications as tools to achieve change. As a response to the SWOT exercise which was carried out during the strategy process, CONCORD will also engage more actively on issues such as fostering a vibrant civic space. Most importantly, the Strategy committed CONCORD to develop a finance strategy to support the achievement of the overarching Strategy.

The Secretariat of CONCORD is responsible for navigating a complex funding and financial environment and for ensuring continuity of funding for the joint work of CONCORD's members in the context of the network. The Secretariat is directly accountable to the Board of Directors (made up of CONCORD members) as regards its finances and to all members, especially during the annual General Assembly, for the sound management of our funding. In 2018, members agreed to a set of Financial Principles. However, since then it has proven difficult to adhere to these Principles, especially as regards the levels of membership fees and the proportions of different funding sources in the overall mix.

The finance strategy does not necessarily need to be timebound and could be updated when considered relevant, within or beyond the timeframe of the overarching strategy.

### Aims, Objectives and Scope

CONCORD intends to take advantage of the commitment to develop a finance strategy to do a thorough review of its finances, starting by establishing what such a Strategy should address. A clear focus on fund-raising will be needed, but should not be the sole focus given the variety of aims the Confederation has.

Through this strategy, the Secretariat therefore aims to ensure that all (present and future) funding streams are optimised. We also aim to ensure both stability as well as flexibility and agility in our

funding. The Confederation benefits from a number of different funding sources, each having different timeframes and reporting requirements. Our only source of financing which guarantees our independence is our membership fees; it is therefore important to ensure their levels and continuity. The membership fee structure will be reviewed as part of the process. Similarly, CONCORD must ensure it has the funding it needs to achieve its four-year Strategy and to guarantee the smooth running of its Secretariat and its ability to service members adequately.

The Secretariat also wishes to ensure that it is aware of and able to address over the coming years key aspects of financial management that might not currently be (adequately) addressed and to better address risk management.

The objective of drawing up a Finance Strategy is therefore to cover these issues while also considering moral – and legal - obligations such as our reserves, ethical guidelines for fund-raising and due diligence processes, and potential KPIs.

Lastly, CONCORD is looking for a wide-ranging set of practical and innovative recommendations as well as clear steps to implement the strategy which will ensure that the network is able to manage its financial future with serenity.

### **Specific duties and responsibilities**

- Using multiple sources of information, and based on experience, develop a clear outline of the Strategy for discussion with the Secretariat.
- Conduct interviews with the Secretariat, Board members, the Finance Advisory Committee and other members (including via focus group conversations) to develop each section of the finance strategy, based on an initial SWOT analysis, and with an explicit but not exclusive focus on fund-raising and a review of the membership fee structure.
- Explore good practices, and draw up a set of scenarios for the coming years
- Draft a finance strategy summarising findings, including good practices and scenarios, and develop recommendations for action in each area, KPIs, and concrete steps needed to implement the strategy.
- Be available, if necessary, to discuss the strategy with the Board of Directors of CONCORD.
- Liaise closely with the CONCORD Secretariat at all times.

### **Deliverables**

- Contents page of finance strategy – agreed with Secretariat.
- SWOT analysis.
- Draft strategy with good practices in relevant sections, scenarios based on various factors, recommendations for action etc.
- Finalised strategy, incorporating feedback from the Secretariat, the Board and other members as relevant.
- Notes from interviews and focus group discussions.

## Budget

The total consultancy budget should be in the region of EUR 18,000 including VAT (+/- 28 working days) over the period 2023-2024.

## Timeline

The assignment would be carried out between November 2023 and April 2024 with the bulk of the background research, consultations and drafting being done by end-December 2024. If it is possible to start earlier, that is preferable.

- A complete timeline and process for the drafting of the Finance Strategy should be agreed in early November.
- The structure and contents of the Strategy as well as the SWOT analysis should be agreed by mid-November.
- A first draft of the strategy should be submitted by end-December for comment and review, with an updated draft by end-January for presentation to the Board of Directors in February.
- The final draft Strategy would be submitted by end-March for a second Board discussion in April.

## Skills and Qualifications

- Proven experience of supporting INGOs to draw up finance strategies.
- Sound knowledge of INGOs operating in the EU context and especially of how membership-based INGO networks operate.
- Strategic thinking.
- Ability to run complex processes with multiple sources of information and variables.
- Ability to analyse information, synthesise inputs and deliver well-thought-through recommendations in a timely manner.
- Ability to manage sensitive and confidential information appropriately.
- Excellent English writing skills; ability to simplify financial issues and write in an engaging, persuasive manner.
- 10+ years of relevant work experience

## Application Procedure

To apply for this post, please upload the following documents to the portal below: the CV of all the applicants outlining their relevant expertise to meet this assignment (max. 2 pages); your proposal on how you will undertake this consultancy, including a basic structure for the strategy (or contents page) showing the key elements to be addressed. Please also include a suggested number of days and their distribution between the different tasks and phases of the work and your day rate (2 pages max).

If you are submitting a group application, please provide the CV for each of the candidates and one single proposal.

Please send your application by **17h CET on Tuesday 26th September 2023**. Interviews will be held in the week commencing **02 October 2023**.

*CONCORD is an equal opportunity employer and considers applicants for all positions without regard to race, colour, religion, creed, gender, national origin, age, disability, marital or veteran status, sexual orientation, or any other legally protected status. All employment decisions are made entirely on merit.*

