



## **Develop a growth strategy for philanthropy, trusts and foundations and institutional giving**

### **Terms of Reference**

#### **ActionAid Ireland**

**July 2023**

*ActionAid Ireland is seeking a consultant for approximately 10-15 days to deliver the below consultancy by October 2023.*

### **1. Background and context**

ActionAid Ireland's strategy [A Just and Caring World for Women and Children 2022-2027](#) sets out our vision for a just and caring world where women's human rights are respected through:

- addressing the structural causes of Gender Based Violence (GBV),
- promoting women's leadership in humanitarian contexts, and;
- amplifying feminist alternatives on economic and climate justice.

ActionAid Ireland's strategy also makes clear commitments to anti-racism, shifting power and decolonisation. Our latest Annual Report is available [here](#).

To date, ActionAid Ireland has received a number of grants from trusts and foundations, and one flagship grant from our main institutional donor, Irish Aid (Development Cooperation Division of Ireland's Department of Foreign Affairs). We are partners with Irish Aid in the Irish Civil Society Partnership Fund (ICSP) for our Women's Rights Programme III- WRP III - (2023-2027). WRP III is implemented across three countries Kenya, Nepal and Ethiopia with three key outcome areas: a) reduction in GBV for women and girls and 2) greater economic empowerment for women in marginalised communities and 3) increased resilience of women and girls to the impacts of climate change and benefit from climate adaptation initiatives.

Other successful grants over the last ten years include ActionAid Federation wide bids at the European level, specifically a pan European bid on FGM (focused on work in Ireland) and an EU bid on campaigning for tax justice, particularly as it affects women's rights. There are two major bids in our pipeline on GBV and climate justice,

both in Ireland. We also have a number of Irish based trusts and foundations that provide grants on a regular basis for work in Ireland with migrant and refugee women, and projects in the Global South.

We are currently developing an overall Income Generation strategy setting out our ambitions for growth in a number of areas, including philanthropy and institutional giving. Our goal is to expand our portfolio of programmes with philanthropy, trusts and foundations and institutional giving. To do this, we need to conduct a scoping of our growth potential in this area and develop a clear strategy that aligns with our strategic objectives.

## **2. The Purpose and Scope**

The overall objective of this consultancy is to develop a growth strategy for ActionAid Ireland philanthropy, trusts and foundations and institutional giving. This strategy will a) inform the overall Income Generation strategy and b) provide a strong foundation for AA Ireland to identify opportunities to strengthen our work across programmes, research and learning, and policy and advocacy.

The scope of the consultancy is to look at three key areas:

- a) Scoping of European and international opportunities for programmatic work in the Global South.
- b) Scoping and assessment of institutional and trusts and foundations for our programmatic and advocacy work in Ireland.
- c) Financial assessment of the investment needed and potential growth expected.

The outputs of this consultancy are, in consultation with Head of Programmes, CEO and others within ActionAid where necessary, to:

1. Conduct a thorough mapping of institutional and philanthropic donors (including trusts and foundations) in Ireland, Europe and internationally that are relevant to ActionAid Ireland, strategically aligned and where we are eligible for funding (including within the Federation framework).
2. Produce a report with recommendations (drawing on analysis of key questions identified in consultation with ActionAid Ireland) with a roadmap outlining the short and long-term steps to be taken by ActionAid Ireland.
3. Provide financial projections on the level of investment required and likely return over a five year period.

## **4. Methodology, deliverables and timeframe**

The growth strategy will require the consultancy to work with the Head of Programmes and the CEO in Action Aid Ireland, along with input from Federation colleagues, to guide the focus of the deliverables.

The proposed methodology is:

- Desk study and review of relevant organisational documentation of funding and programmes, donor landscape in Ireland, EU and internationally,
- Key informant interviews with key people within ActionAid Ireland, the ActionAid federation and other ActionAid entities, and relevant external actors (NGOs, donors, academics etc.).
- Participation in a workshop with ActionAid Ireland on the Income Generation strategy.

Deliverables	Areas to cover	Time
<p>Mapping of institutional and philanthropic donors strategically relevant and where we are eligible including:</p> <ul style="list-style-type: none"> <li>• A powerpoint presentation to ActionAid Ireland</li> <li>• Revised mapping based on feedback</li> </ul>	<p><b><i>Scoping of European and international opportunities</i></b></p> <ul style="list-style-type: none"> <li>• Within the Federation ‘donor owner’ framework, which institutional and philanthropic donors are available for us to cultivate?</li> <li>• Which of our strategic priorities would be best aligned with the available donors?</li> <li>• How do we best cultivate these?</li> <li>• How do we best work with the AAEU team and other AA entities to explore opportunities for funding in the Global South?</li> <li>• What is our realistic capacity within the programme’s team to do this? How would</li> </ul>	<p><b>28<sup>th</sup> September 2023</b></p>

we ensure donor and opportunity scanning is built into our work?

***Assessment of Irish focused work potential with institutions and Trusts and Foundations and our approach thus far***

- How should we focus our national work?
- Are we effectively engaging Irish Trusts and Foundations?
- How can we handle joint federation bids (co-financing etc)?
- How do we best work with the AAEU team to explore opportunities for national work in Ireland, via Federation EU bids?
- What is our realistic capacity for funding bids, horizon scanning and donor cultivation?

***Financial assessment***

- Depending on what is identified from the scoping, what returns could we expect in growth of restricted or unrestricted work?
- What investment would we need to make?

***Our niche***

	<ul style="list-style-type: none"> <li>➤ Recommendations on any niche area of added value and focus for ActionAid Ireland.</li> </ul>	
Short report, recommendations, and roadmap.	<ul style="list-style-type: none"> <li>• Sharing of a draft and incorporating feedback</li> <li>• A presentation on the recommendations and roadmap to ActionAid Ireland and other relevant AA entities.</li> <li>• Financial projections.</li> </ul>	<b>9<sup>th</sup> October 2023</b>

## 5. Management Arrangement

The successful consultant will report to the ActionAid Ireland Head of Programmes and CEO, while working closely with other relevant ActionAid entities in programme and funding departments.

## 6. Expected budget

The budget for this is €11,000 maximum.

## 7. Profile

The preferred candidate for this consultancy will have:

- Significant and proven experience in supporting organisations to grow their profile and success rate with philanthropic and institutional donors.
- Experience in securing or mapping funding for women’s rights and feminist movements working on transformative change.
- Excellent knowledge of the funding landscape within Europe, internationally.
- Experience of working with institutional donors and trusts and foundations.
- Excellent understanding of human rights based approaches and the areas outlined in the ActionAid Ireland strategy.
- Ideally knowledge of funding within Ireland for programming, research and learning and policy and advocacy.

## **8. Application process**

The closing date for submitting expressions of interest is **COB on 21<sup>st</sup> August 2023**.

Tenders for this work must include:

- Name of applicant / organisation name, address and contact details
- A statement outlining the understanding of the brief, relevant experience and proposed approach (max 1,000 words)
- Personnel involved – details of all personnel who will be involved, including a CV which outlines their qualifications/experience. In the case of consortia, please assign one person / organisation as the principal contact
- Examples of two relevant previous projects along with a separate referee for each, including contact details, for both projects
- Costs – detailed costs including any associated costs, VAT inclusive
- Notification of any potential conflicts of interest
- An up-to-date copy of the tenderer's Tax Clearance Certificate and relevant insurances.
- Signed Declaration of all the above the contract for services rests with ActionAid Ireland. The primary point of contact for the successful tenderer will be Gráinne Kilcullen, Head of Programmes, ActionAid Ireland.

The successful tenderer will be expected to:

- Maintain regular contact with ActionAid Ireland, responding to communications in a timely manner
- Be flexible and responsive to the needs of the organisation as they arise
- Be proactive in seeking clarification, information or guidance as needed

### **Procurement process/timings**

An important value of ActionAid Ireland is being transparent and accountable. We expect the successful tenderer to adhere to ActionAid Ireland's values and to observe any of our policies which are deemed relevant.

**Please submit your applications to [grainne.kilcullen@actionaid.org](mailto:grainne.kilcullen@actionaid.org) by 21<sup>st</sup> August 2023. The successful applicant will be appointed by August 25<sup>th</sup>.**

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