

REQUEST FOR EXTERNAL EXPERTISE FOR THE DEVELOPMENT OF GRANT PROCEDURES

About WBF

The Western Balkans Fund (WBF) is an International Organisation located in Tirana, Albania, founded by the governments of Albania, Bosnia and Herzegovina, Kosovo¹, Montenegro, North Macedonia and Serbia. As a grant-making organization, WBF provides direct support to joint regional projects aiming to further strengthen skills of civil society in the Western Balkans and pursue regional cooperation and reconciliation via a people-to-people approach. WBF began its first investments in the Western Balkans in November 2017 with one Call for Proposals in Western Balkans region. Through the first three Calls for Proposals, WBF supported 68 regional projects. The grants have been supported through steady commitments of the six Ministries of Foreign Affairs. In the upcoming period, WBF's granting is expected to increase, including through contribution of external bilateral and multilateral donors.

Background and objectives of the assignment

Based on the experience of WBF in providing grants to support regional collaboration projects in the Western Balkans, the need for support coming from Civil Society of the Western Balkan region is substantial and increasing. Through its grant schemes in total 3 Regional Calls for Project Proposals in the period from November 2017 to May 2020, the WBF attracted over 890 applications from civil society organizations and other stakeholders, with the direct inclusion of 3,430 organizations, as lead and/or partner organizations.

Currently, WBF is in the preparatory period of launching the 4th Call for Project Proposals in cooperation with European Union and is **seeking for External Expertise** who will assist the team in improving grant making procedures in order to harmonize the existing procedures with donor requirement. WBF in order to ensure higher number of applications, aims to modify the application procedure in a friendlier version which will be accessible by organisations with limited administrative capacities.

This assignment should lead to the development of Application and Evaluation Guidelines according to EU practices, which all staff understand and apply, and which do not place an undue burden on WBF's grantees.

Role and Deliverables of the External Expert

More specifically, this assignment is expected to enable WBF to:

- Improve overall grant making procedures, especially through:
 - ⇒ Revision of the application and evaluation guidelines by adapting according to EU/C practices and WBF strategy;
 - ⇒ Revision of WBF's grant-making rules and procedures according to M&E framework;
 - ⇒ Revision of WBF contract with the third parties;
 - ⇒ Revision of visibility guidelines and reporting requirements
 - ⇒ Suggesting any required adaptations based on EU/C rules applying to WBF and third parties;
 - ⇒ Provide the WBF team with targeted training on EU/C rules that apply to the grant;
 - ⇒ Alignment of WBF's procedures that emphasize quality control and regional ownership;
 - ⇒ Design and development of project proposal evaluation tools;
 - ⇒ Develop the Terms of References for the recruitment of External Evaluators;
 - ⇒ Develop the induction training material for the External Evaluators;
 - ⇒ Develop presentation on the Call for Proposal Application guidelines to be used during the information sessions;
 - ⇒ Develop presentation on the implementation guidelines for WBF with third parties to be used in the Partnership Workshop.

¹ This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

To meet these objectives, the grant making procedures developed through this assignment should:

- Be compliant with all relevant frameworks applying to WBF (WBF Statute and Annexes and EU requirements);
- Cover all aspects of grant management at WBF;
- Be clear and user-friendly (or come with an associated grant manual) and come with any necessary associated tool or template;

Once finalised, the grant making procedures will be submitted for approval to WBF's governing board and Contracting Authority.

Deliverables:

- Deliver an induction session on the new application & evaluation guidelines to all WBF staff
- Project Proposal Application templates (narrative & financial)
- Evaluation tools and reporting templates
- Application Guidelines presentation
- Implementation Guidelines presentation
- Final version of the guidelines based on WBF's feedback, as well as any associated document/template deemed necessary for the implementation of the Call for Proposal delivered in Word digital format.

Timeframe and coordination

This assignment is expected to require approximately 10-15 consultancy days and to follow the below indicative schedule:

- **August:** preliminary conversations with WBF and review of all relevant documents by 30th August
- **August/September:** Development of the application guidelines and submission to WBF by 15th September.
- **September:** Finalization of the Application Guidelines and all associated documents by September 30th.
- **September/October:** Integration of WBF feedback and submission of the Evaluation Guidelines by October 15th.
- **October:** Finalization of the Evaluation and Implementation Guidelines and all associated documents by October 30th.

The expert will be expected to work closely with WBF's Programme staff. Face-to-face work with WBF in Tirana is desirable.

Qualifications

- Extensive experience in EU grant making rules and procedures (including with non-profit organisations)
- Demonstrated track record in advising organisations on grant management and developing policies
- Demonstrated experience and familiarity with the European Commission and PRAG rules will be considered an asset
- Excellent (written and oral) communication and drafting skills in English
- Capacity-development skills
- Ability to work with multicultural teams

Application process

Applications should be submitted via email to Recruitment@westernbalkansfund.org no later than August 20th.

Application needs to include:

- CV;
- Cover letter, indicating relevant skills for this assignment, including recent experience with the development of financial policies/manuals;
- Two references/previous clients who are able to comment on your ability to deliver on the strategy and/or organizational development.

Financial proposal

The financial proposal shall specify a total lump sum amount, and payment terms around specific and measurable (qualitative and quantitative) deliverables (i.e. whether payments fall in instalments or upon completion of the entire contract). Payments are based upon output, i.e. upon delivery of the services specified in the ToR. In order to assist the requesting unit in the comparison of financial proposals, the financial proposal will include a breakdown of this lump sum amount (including travel, per diems, and number of anticipated working days).

Travel

All envisaged travel costs if any must be included in the financial proposal. This includes all travel to join duty station/repatriation travel. In general, WBF should not accept travel costs exceeding those of an economy class ticket. Should the Expert wish to travel on a higher class he/she should do so using their own resources. In the case of unforeseeable travel, payment of travel costs including tickets, lodging and terminal expenses should be agreed upon, between the respective business unit and Expert, prior to travel and will be reimbursed.

Evaluation

The Expert will be evaluated based on the following methodologies:

Cumulative analysis - When using this weighted scoring method, the award of the contract should be made to the Expert whose offer has been evaluated and determined as:

- Responsive/compliant/acceptable; and
- Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation;
- Technical Criteria weight – 70 points;
- Financial Criteria weight – 30 points.
- Only candidates obtaining a minimum of 70 points would be considered for the Financial Evaluation.

Evaluation criteria

- Education background - 20 points;
- Experience as defined in the ToR - 25 points;
- Competences as defined in the ToR - 25 points;
- Methodology and overall approach - 30 points;