



Example: Consultant — Request for Proposal

Note: This document is provided for information purposes only. Health professional associations making use of this resource should revise and modify it for use in their specific circumstances.

[The Association of Ob/Gyn of XXX]

[ADDRESS]

Request for Proposal

Development of a Draft Financial Sustainability Plan

Closing Date and Time: [DATE, MONTH, YEAR] at [HOUR]

Proposal must be submitted by email to: Chair, Financial Sustainability Plan Ad Hoc Committee at following email address: [EMAIL]

Background Information

The Association of Ob/Gyn of XXX is a health professional association dedicated to improving reproductive, maternal and newborn health in [COUNTRY OF ORIGIN]. It is currently supported by XXX members and is involved in a number of national and international interventions seeking to improve maternal and newborn health in the country. In [YEAR], the AOGXXX developed its first strategic plan and has retained as one of its priorities the strengthening of its financial sustainability. The AOGXXX proposes to progress toward this objective by developing a long-term financial sustainability plan. The association is seeking the services of a Consultant to assist with the development of the plan. Included in the exercise is a 2-day workshop where the Board/Executive Committee and other leaders within the Association will reach agreement on the main content of the draft financial sustainability plan.

Services to be provided

In keeping with the collaborative approach of the association, the Consultant will:

- Review selected association documents and information for the purpose of gaining a better understanding of its goals, objectives, strategic directions, etc.;

- Develop a survey tool that will permit the association to gain insight as to their members' thoughts and suggestions on how the Association can work toward greater financial sustainability;
- Conduct a survey among 10 per cent of the membership once the survey tool has been approved by the Board/Executive Committee;
- Analyse the findings of the survey and, in collaboration with the ad hoc committee, use these to design and develop a 2-day workshop, including the development of all workshop materials and tools;
- Facilitate the 2-day workshop and lead the discussions related to the content of the draft financial sustainability plan;
- Finalise the draft financial sustainability plan;
- Prepare a final report, following the workshop, with recommendations to AOGXXX on how to proceed with the completion of the exercise.

Deliverables and corresponding time frames

The Consultant is expected to start by [START DATE]. The following table provides the deliverables and the timeframe related to the contract.

Deliverables	Time frame
Submission of summary of findings: review of association documents and information; membership survey; etc.	To be determined
Submission of workshop agenda and materials	To be determined
Delivery of workshop, submission of draft financial sustainability report and submission of final consultancy report	To be determined

Required competencies

The Consultant should possess a graduate degree or equivalent in financial management or another related subject, and/or experience related to financial management of small non-governmental organisations. Other required competencies include:

- Excellent understanding of financial sustainability issues as it relates to smaller non-government organisations;
- Proven experience in supporting small NGOs to develop financial sustainability plans and/or strategies;
- Experience and expertise in developing and conducting workshops with participants who have limited financial management knowledge and experience;
- Ability to work in [LANGUAGE PREFERRED].

Interested consultants are invited to express their interest by submitting the following:

- A cover letter summarising experience and availability;
- A curriculum vitae (three-page maximum);
- A summary of the approach and methodology to be applied;
- A detailed work plan, with level of effort and timelines;
- A budget;
- Two references.

Please note:

- The level of competency of the Consultant, the Consultant's experience of completing similar work, as well as the overall cost of the contract will be considered in the selection process.
- Only those candidates selected for an interview will be contacted.