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| TERMS OF REFERENCE for *[name of assignment, dates]*  *[This template is for assignments below the EU threshold – MFA’s procurement procedures must be observed, so please consult the Procurement Portal]* |

**Background and context**

*[Provide the background for the assignment, including short description of the programme/project in question; short description of the country and/or thematic context within which the programme/project is situated; specify where (country, location) the Consultant must perform the Services.*

*The purpose of the description is to ensure that the Consultant is aware of the overall framework for the assignment. Reference to the finance act could be relevant. Reference to ministry guidelines guiding the assignment will be useful.]*

**Purpose**

*[State the overall purpose of the assignment (i.e. a description of what the responsible unit intends to use the deliverables for) in order to assist the Consultant in delivering the most useful outputs.*

*It is important that the purpose, and subsequent objective, is not to undertake work that is vested with the responsible unit as a core mandate. Consultants can only assist and provide input to a process managed by the responsible unit.]*

**Objective**

*[Insert a short description of the objective of the assignment (i.e. a description of the situation/knowledge/design the responsible unit wants to have at the end of the assignment).]*

**Scope of Work**

*[Insert a description of the activities and services to be performed by the Consultant. However, remember to leave enough flexibility for the Consultant to organise the work in the most effective and efficient way (not all circumstances can be foreseen in advance).*

*The Consultant may also be asked to further specify the scope of work either in the tender or in the inception report.*

*When defining your scope, you may not be able to foresee the full length of the contract or you may not be sure if you need to scope the task differently on a later stage. If so, you should consider including options in your ToR as to any extension of the contract in time (add optional period) or services (describe optional services). Do not forget to estimate the value of the options as part of the total value of the contract. By using specific well described options, you may minimize the need for later amendments of the contract.]*

**Output/deliverables**

*[Insert a description of the actual deliverables the Consultant is supposed to deliver. Try to be as specific as you can, without limiting the ability of the Consultant to provide their specialist competencies and suggest new and better ways to perform the assignment. The deliverables can include (but are not required to):*

*• Inception report (i.e. a detailed description of the Consultant’s approach in order to achieve the objective)*

*• Meetings and presentations (please consider that Consultants will use resources on preparing presentations etc. Therefore, be careful not to ask for too many, as resources may be used too much for these activities)*

*• Draft report*

*• Final report*

*• Delivery of training*

*• Delivery of products, concepts etc.*

*Include, if possible, not only quantitative deliverables, but also aspects of quality.*

*The list of deliverables should, when delivered, fully achieve the purpose and objective of the assignment.*

*Include the location of delivery.]*

**Timing**

*[Insert a commencement and a completion date.*

*Insert a description of when the deliverables, key events or other significant milestones must be delivered by the Consultant. However, consider the use of periods instead of specific deadlines in order not to limit the flexibility of the Consultant.*

*The Consultant can also be asked to further specify deadlines either in the tender or in the inception report.]*

**Methodology**

*[If the assignment requires agreement on the type of methodology (e.g. in large assignments with strong focus on analysis or assignments where the process is as important as the actual deliverables), this section can be included to ensure the desired methodology is applied.*

*However, consider the need for specific methodologies carefully in order not to limit the flexibility of the Consultant.*

*In order to ensure that the Consultant understands the scope of the assignment and that there is the necessary coherence with Appendix 3C (the Consultant’s description of the services), it should be clearly stated what is considered as invariable (minimum) requirements and what is merely considered as wishes (but not requirements).*

*It is recommended to use wording like: “It is a minimum requirement that […]” and “It is a wish (but not a requirement) that […]”*

*Minimum requirements must be suited to establish clear and binding obligations for the Consultant. Consider the need for minimum requirements carefully. If a tender does not fulfil a minimum requirement, the tender will be rejected.*

*Wishes must make it clear for the tenderer that the matter should be addressed in the description of the services.*

*It should be clearly defined what the responsible unit will specifically consider as a good solution in the evaluation of tenders. These wishes could include the extent to which the methodology:*

*• responds to the objectives of the assignment*

*• is tailored specifically to the assignment*

*• has identified special issues in relation to the assignment and include effective solutions*

*• suggests any new approaches to the assignment that help achieve better outcomes*

*• is flexible and easy to adapt to changes that might occur during implementation of the assignment.]*

**Qualifications and Competence of Staff**

*[Insert a description of the required and desired qualifications of the individual specialists (e.g. level of education, certifications, years of experience in the areas of assignment, previous experience with this type of assignment, language skills, experience from the countries related to assignment, personal skills such as ability to facilitate, manage, and do training etc.).*

*While a long list of required qualifications can be desirable, the list should be prepared keeping in mind that the more qualifications are required, the smaller the pool of Consultants who qualify will become.*

***Qualifications and Competence of Staff***

*[Consider the need for minimum requirements carefully. If a tender does not fulfil a minimum requirement, the tender will be rejected.*

*Add relevant number of specialists required.]*

*[e.g.Team Leader]*

*•* ***General Qualifications***

*o Minimum requirements*

*o Wishes*

*•* ***Adequacy for the Assignment***

*o Minimum requirements*

*o Wishes*

*•* ***Experience in the Region and Language***

*o Minimum requirements*

*o Wishes*

*[Team member 2]*

*•* ***General Qualifications***

*o Minimum requirements*

*o Wishes*

*•* ***Adequacy for the Assignment***

*o Minimum requirements*

*o Wishes*

*•* ***Experience in the Region and Language***

*o Minimum requirements*

*o Wishes*

**Estimated budget and level of effort**

*[The budget of the contract must cover both fees and reimbursable expenses net of VAT(as set out in Article IX in the Consultancy Agreement).*

*Therefore, it is important to specify how many hours of work (level of effort) that are expected from individual staff and/or from the team in total. However, consider the use of ranges instead of specific numbers of hours in order not to limit the flexibility of the Consultant (i.e. minimum and maximum number of hours). Moreover, it should also be stated if tenderers can propose different levels of effort.*

*It should also be considered whether the contract should include a specified maximum budget in order to avoid that tenders are priced above the responsible unit’s budget for the contract. However, a specified maximum budget can also influence the price in the tenders which can restrain competition for prices. Therefore, the responsible unit should consider increasing the weight of price (e.g. to more than 50%) in the evaluation of tenders and/or defining the scope of the contract with further detail.*

*If a maximum budget is specified, tenders with a price above the budget will be rejected.]*

**Management**

*[Insert a brief description of the management of the assignment.*

*The Consultant is responsible for delivery of the outputs required and for internal management of the consultant team.*

*A contact in the responsible unit should be appointed as responsible for the management of the assignment on behalf of the responsible unit, in some instances multiple points of contacts could be appointed, but it should be clear who is overall in charge of the assignment in the responsible unit (in addition to what is set out in Appendix 1).*

*Consultants should always be under direct management and supervision by the responsible unit. Also, Consultants cannot be tasked with assignments where they undertake responsible unit responsibility of managing other Consultants, although different teams of consultants can be asked to supplement each other and do quality assurance etc. on the work of other consultancy assignments.*

*The responsible unit’s responsibility in connection with the assignment should be clearly stated, including how and when the Consultant should liaise with the responsible unit. Further, it should be clearly defined how the responsible unit will apply the Consultants deliverables.]*

**Background documents**

*[Insert a list of background documents, which are required for the Consultant to undertake the assignment. The list should be exhaustive, but also taking into account that the consultants will need to spend time, and thereby use the budget, on reading through the listed documents.]*

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| Date |  | MFA/team leader |