



**AFRICA &
MIDDLE EAST**

TERMS OF REFERENCE

FOR

**PROJECT EVALUATION AND ORGANIZATIONAL BUSINESS PROCESS
REENGINEERING**

SEPTEMBER 2020

1.0. Introduction

This document outlines the Terms of Reference (TOR) for the proposed Project Evaluation of the Facilitation of Investment in Sustainable and Transformational Businesses and Lifestyles in Africa Project and Organizational Business Process Reengineering of WFTO Africa & ME,

World Fair Trade Organization Africa and the Middle East (WFTO Africa & ME), is the World Fair Trade (WFTO) Regional Network/Chapter for Africa and the Middle East. Regional Networks/Chapters are part of the WFTO structure for the purposes of organizing the affairs and work of the global network. WFTO Africa & ME, just like the other Regional Networks/Chapters is a legal entity, registered in Kenya as a non-profit organization in 2007. The original geographical scope of WFTO Africa & Me was limited to the continent of Africa, until in 2010 when the Global Board, in an alignment process, expanded the scope to include the Middle East sub-region. WFTO Africa & ME envisions transformed trade structures and practices that work on favor of the economically marginalized, promote sustainable development, justice and a healthy planet. In order to contribute to the vision, the WFTO Africa & ME mission is to facilitate members' organizational capacity to comply with Fair Trade Standards, enhance their ability to access markets and to have their voices heard. The network is currently present in 23 countries across the region, in which the network continues to engage with members, enhancing their capacity meet Fair Trade Standards and the provision of other support services, others through project engagement. However, project work that has provided some of the much needed capacity building and market access measures to members, has been largely dependent on financial support from development partners, and the same has only been limited to a few countries.

WFTO Africa & ME Annual General Meeting (AGM) is the body mandated to take decisions on the overall nature and direction of the organization as well as the election of the members of the Board. The Board is responsible for the governance and leadership of the organization. The day to day running of the network is the role of the Secretariat headed by Regional Director.

2.0. Background

The proposed task has two separate but related elements, namely, provision of an external input into an internal project evaluation and organizational business process reengineering of WFTO Africa & ME.

The first element deals with Project Evaluation exercise based on Facilitation of Investment in Sustainable and Transformational Businesses and Lifestyles in Africa. The 2-year Bread for the World - Germany, funded project, piloted in Kenya and South Africa, is aimed at enhancing the growth and development of domestic Fair Trade markets in both Kenya and South Africa. An external evaluation component was inbuilt into the project implementation plan, however, after due consultations and considerations between the project partners, it was agreed that an internal evaluation process facilitated by an external expert consultant would be sufficient to provide critical input into the next phase of the project – in effect, a hybrid evaluation approach. This approach is primarily a strategy for strengthening capacity and promoting the culture of monitoring and evaluation in the organization. The external consultant will bring into the evaluation additional skills and knowledge, make use of specialized methods and reinforce objectivity.

The second element – Organizational Business Process Reengineering – is a more comprehensive analysis of the institution and the organization, a process that is also expected to provide immense benefit to the

development of the next phase of the domestic fair trade project. However, the overall need for Organizational Re-engineering is much more profound. The background to this include the fact that the last few decades have involved a great deal of major changes in the broader environment within which the organization operates. The changes in political, economic, social as well as technological environmental have transfigured the reality of a world that organizations are learning to interpret with new perspectives. While the world is more global and greater opportunities are being created, eras of economic growth and democracy are accompanied by greater inequality and persistently high levels of poverty. These are just a few of the paradoxical changes that our society is undergoing; a society characterized by the growing weakness of traditional systems where individual and collective vulnerability is increasing. It is this vulnerability that often hinders the full potential of citizens.

These fast and increasingly complex developments mean actors are forced to question their role, and WFTO Africa & ME is no exception. The network must think and re-think its role, vision and mission as well as strategies and evaluate its legitimacy within these changing contexts, hence the need for change, informed by a thorough formal reflection of itself. Yet, since inception, WFTO Africa & ME has seldom had the opportunity for a formal major external institutional and organizational review process to inform its strategic development and priorities. As a result, the network has not effectively leveraged on the emerging opportunities to support growth and development of a strong and compelling Fair Trade Agenda in the region and to face the challenges of institutional development as well as those that affect the members. Indeed, members have challenged the network to prioritize service and value addition to their businesses, while potential Fair Trade Organizations have challenged to strengthen the value proposition offering by the network to justify why they should be part of the organization. Clearly, there is need for change.

However, the change must be the result of a solid commitment to service, and which goes beyond the need for survival. Indeed, the desire for change within WFTO Africa & ME is informed by two motivations, namely, the need to adapt to the aforementioned changing environment. A new and important development within the operating environment is the COVID 19 Pandemic and its unprecedented impact on economies, businesses and lives in the region and around the world. Specifically, for the Fair Trade organization, it is clear that the impact of COVID-19 on businesses is severe, and measures to mitigate the impacts during and post COVID 19, will continue to influence both membership relationship and business needs for many years to come. However, as well as the desire to make a greater impact and influence as a regional Fair Trade Network; internally, the network must address the critical factor of resources, both human and financial. To better serve the members and to increase its influence, and more suitably fulfil its role, WFTO Africa & ME needs to be able to continuously question its relevance and position of its programmes, its efficiency, effectiveness, impact and sustainability.

3.0. Objectives and Assignment

3.1. Objectives

The main Objective of the Project Evaluation and the Organizational Business Process Reengineering are twofold: -

(i) to inform the development of the next phase of the Facilitating Investment in Sustainable and Transformational (FIST) – Businesses and Lifestyles in Africa, informed by both the experiences and learning in the pilot phase of the project.

Specifically, the evaluation will assess the project design, scope, implementation status and the capacity to achieve the project objectives. It will collate and analyze lessons learnt, challenges faced and best practices obtained during implementation which will inform future project strategies. The emphasis on learning lessons speaks to the issue of understanding what has and what has not worked as a guide for future planning. The evaluation will generate knowledge from the implementation of the project and reflect on challenges, lessons learnt and propose actionable recommendations for the next phase on the project. The specific objectives for the project evaluation are the following: -

- i) To assess the extent to which the pilot project effectively achieved its expected outcomes
- ii) To identify potential strategic directions for the project's next phase
- iii) To assess the extent to which the pilot project strategic intent was relevant to the development priorities of the organization within the context of the proposed organizational business transformation reengineering process.

(ii) to position WFTO Africa & ME to better serve the members, to become a champion and a major influencer of the growth and development of Fair Trade in the region. To this end, the re-engineering process is intended to help envision the future of WFO Africa & ME and to explore possible paradigm shifts on priorities and business orientation required to achieve that future.

3.2. The Assignment

In pursuit of the objectives above, WFTO Africa & ME is seeking the services of a consultant/consultancy to undertake the following tasks: -

- (i) to provide expert input into the internal end of project evaluation of the Facilitating Investment in Sustainable and Transformational (FIST) – Businesses and Lifestyles in Africa Project and
- (ii) To conduct Organizational Business Process Re-engineering.

4.0. Scope of Work

We are seeking for a flexible and adaptive Project Evaluation and Organizational Re-engineering exercise, based on the following scope of work: -

4.1. Project Evaluation

For the Pilot Project, the evaluation will cover the duration of the project from June 2018 – September 2020. The external consultant will work closely with a Project Evaluation Reference Team (PERT) comprising of members of the Project Team and representatives of Project Stakeholders to evaluate the progress and outcomes against the project targets. Primarily, the role of the external consultant would be to provide guidance in terms of methodologies to be applied in the evaluation process. The consultant will review the assessment report by PERT and provide findings and further analysis, the basis of which the consultant will work with PERT to develop and present options and recommendations for the design and implementation of the next phase of the project. The Evaluation will be carried out against the following criteria: -

- (i) **Relevance:** The appropriateness of project objectives to the problems that it was supposed to address, and to the contexts within which it operated. It should include an assessment of

the quality of project preparation and design. Among the key questions that the evaluation should address include: -

- How relevant was the intervention (Domestic Fair Trade Market) to the primary stakeholders?
- How relevant was the conception to the strategies and development of WFTO Africa & ME?
- Were the results, indicators and their means of verification adequate? What possible adjustments would the evaluation recommend?

(ii) Effectiveness: An assessment of the contribution made by results to achievement of the project purpose, and how assumptions have affected project achievements. Among the key questions that the evaluation should address include: -

- To what extent has the project achieved the expected results?
To what extent has the intervention contributed to broader conversation on building synergy among Fair Trade and other Actors to develop a joint approach to broader issues such as harnessing the domestic market and South –South Trade?

(iii) Efficiency: The fact that the project results have been achieved at reasonable cost. Among the key questions that the evaluation should address include: -

- Were all activities undertaken as planned?
- Were all activities done within the budget?

(iv) Sustainability: An assessment of the likelihood of results produced by the project to continue to flow after external funding has ended. Among the key questions that the evaluation should ask include: -

- Are the results achieved so far sustainable?

(v) Looking Forward Perspective

- What are the key lessons drawn from the project over the implementation period that should be considered in the next and future projects and programmes?
- What key strategic approaches should the project embrace to improve on overall project performance?
- Based on the project contexts (in the case of Kenya and South Africa) what is/are the unique selling points for the project's existence in the targeted countries and its influence at the national and regional level?

4.2. Organizational Business Process Re-engineering ((OBPR)

For the Organizational Business Process Re-engineering, the consultant/consultancy will work closely with a Special Task Reference Team (STRT) comprising the Secretariat, Board, selected representative of the membership and 2 volunteer external persons (experts on organizational and institutional development) to facilitate the Organizational Re-Engineering Process. The work has been divided into two related steps as follows: -

I. Assessment Step

The Assessment Step will entail the following activities: -

Project Kick-off Presentation: In order to ensure a shared understanding of the task, the consultant will organize a presentation to the STRT.

Discovery Workshops – intensive workshops that bring together the consultants and the STRT as well as STRG to assist in determination of the current business processes, existing problems and occasional issues, solutions to critical business problems and achievement of key business objectives. Workshops will aim to explain to the STRT the effects of change, how to prepare, equip them with the necessary tools and expected benefits from the change;

As-Is Study – The consultant to facilitate the validation of the objectives of the task with STRT. review, map and analyze current business processes including the roles and responsibilities of institutional structures and individual functionaries.

II. Organizational Business Process Re-engineering ((OBPR)

The organizational Business Process Reengineering Step will entail the following activities: -

To-Be processes – Provide a detailed study of new organizational business processes by reiterating and validating the WFTO Africa & ME organizational/business objectives with the STRT against each of the processes introduced, including the roles and responsibilities of institutional structures and individual functionaries - vertically at all the proposed levels of administration, and horizontally across the proposed other key cross-functional units;

Gap analysis – Analyze performance, structures and requirements of current organizational business processes and the redefined (improved) processes, point out the benefits as well as possible changes that could impact other aspects of the organizational functions and systems;

Organizational Business Process reengineering – map and document the transformation process using appropriate business process reengineering tools, methods and techniques. Identify the best practices for adoption with details of alternatives and their suitability. Conduct a thorough gap analysis and propose the appropriate organizational business process reengineering tools such as Business Activity Monitoring (BAM) or process mining to fulfil the process;

Action plan – The consultant will facilitate the development of an Action Plan which clearly defines, a step-by-step manner, the scale-up, approach and methodology. The Action Plan will be one consolidated document, which shall include tactics, activities and operational goals to be implemented with specified time frames, detailed implementation approach/schedule, anticipated outcomes, risk mitigation plans, and related financial and other resource estimates, such as detailed cost estimation and timeline.

Change Management and Capacity Building – The consultant working with STRT is expected to facilitate the design a viable and detailed change management and capacity building strategy to be executed by WFTO Africa & ME, in a manner that embed in the organization the benefits of the business process reengineering.

Wrap-up Event – The consultant will organize a final wrap-up event to present the final results of this project to the STRT and invites.

5.0. Methodology

Given the current COVID 19 situation, both the Project Evaluation and Organizational Business Process Re-Engineering will be conducted virtually and will be carried out on the basis of a desk study and in-depth consultative online meetings via qualitative and quantities data collection methods.

In regards to Project Evaluation, the desk study should cover the following documents:

- Project contractual documents and any further amendments;
- Documents produced throughout the project;
- Evidence of impact collected by the project, including progress reports
- Other relevant documentation.

While the Project Evaluation Reference Team (PERT) will be the main reference for the purposes of the evaluation, notwithstanding the need to interview other stakeholders. For the Organizational Business Process Reengineering (OBPR), Special Task Reference Team (STRT) will be the main reference providing guidance to the process. However, appropriate space will also be provided for engagement with other stakeholders. In both tasks, the methodologies adopted should be coherent with the participatory approaches that bring key stakeholders on board.

6.0. Deliverables and Outputs

6.1. Project Evaluation

The following are the deliverables that the consultant will present to the Management of WFTO Africa & ME: -

- (i) An inception report, to be submitted one week after the beginning of the evaluation, explaining the methodology, work programme and timetable for the evaluation.
- (ii) A final report to be submitted at the end of the evaluation with a maximum extension of 20 pages excluding annexes.

The final evaluation report will be structured as follows:

- Executive summary
- Main section
 - a. Introduction:
 - i. Project description
 - ii. Evaluation objectives and methodology
 - b. Analysis of the findings based on the assessment of WFTO according to the evaluation criteria
- Conclusions and recommendations
- Annexes:

6.2. Organizational Business Process Reengineering

The following are the deliverables that the consultant will present to the Management of WFTO Africa & ME

- (i) Phase 1 **Project Inception Report**, the consultant shall prepare a Project Inception Report, which shall consist of the detailed Project Work Plan to carry out the task. The Project Work

Plan shall have details of the Project team, detailed timelines, a detailed note on the proposed approach and methodology. The terms of reference may be improved and refined for better achievement of the outcomes, through mutual discussions at the inception report stage.

- (ii) As-Is Study Report, the consultant shall prepare As-Is Study Report including key stakeholder analysis, identification of priority areas, and detailed process diagrams for the current organizational business processes. The report shall also identify current threats to the organisation, bottlenecks and areas of possible improvement.
- (iii) Phase 2 To-Be Study Report, including Re-engineered and mapped organizational business processes, documented as Standard Operating Procedures
- (iv) Comparative Report (Gap Analysis), analyzing performance and structures of the current organizational business processes and the redefined (improved) processes, to point out areas in which the organization could be instrumental to trade actors in the region but also the possible changes that could impact other aspects of the WFTO Africa & ME functions and systems.
- (v) Business Process Reengineering Recommendations Report. The consultant shall prepare a Organizational Business Process Reengineering Recommendations Report including all areas outlined in the scope of work and as may be modified through discussions during Phase I
- (vi) **An Action Plan:** The consultant shall facilitate preparation of an Action Plan that integrate the findings of the project evaluation as well as OBPR Process, formulated in a manner that ensures implementation of new business processes; detailed Training and change management plan, for achieving the proposed recommendations, including strategy for capacity building for WFTO Africa & ME Management and staff.

In the course of the evaluation exercise, the Consultant will hold a weekly virtual meeting with the START to report progress based on the agreed work plan and to resolve possible constraints and mitigation measures;

7.0. Indicative Timeframe

Both, the Project Evaluation and Organizational Business Process Reengineering is expected not to take more than 30 consultancy days, between the period of September and November 20th 2020.

8.0. Qualification

The successful Consultant is required to meet the following criteria:

- A project manager/team leader – ideally, governance or business reengineering expert for development institutions, particularly regional membership network not-for-profit organizations;
- Solid demonstrated experience with conducting project evaluations and business process reengineering, including methodologies as well as excellent facilitation skills;
- Process expert – process expert with relevant experience in the study of regional membership network not-for profit organisation processes, process reengineering, institutional strengthening, project and program management, etc. Possess international experience and strong familiarity with sound local, regional (Africa and the Middle East)

and international market practices and global trends preferably in private sector development, not-for-profit organisation, broad social enterprises as well as impact investment developments.

- A business process designer – an expert with deep knowledge of standard and widely accepted business process modelling methods, techniques, tools, languages and notations, its analysis in static terms and simulation in dynamic conditions, process bottlenecks detection, etc.;
- High capacity to adapt and understand the local and regional contexts to propose tailored-made and realistic solutions/recommendations, which will be aligned with the business strategy and expectations of the WFTO Africa & ME
- Fluency in English;

9.0. Evaluation Criteria

The Consultant will be evaluated based on preferential point system scoring based on the following parameters.

- a) Proposals must score a minimum of 70% in the technical evaluation to proceed to financial evaluation;
- b) Applicants who meet the minimum technical criteria will be scored on the 70/30 principle, based on their price and technical ratings respectively;
- c) The applicant with the highest total number of points will be awarded the contract at the discretion of the WFTO Africa & ME subject to pre-contracting negotiations and scoping.

10.0 Submission Instructions

Interested and qualified Consultants are invited to submit their proposal(s) comprising of the following:

- a) An understanding of the consultancy requirements and a short profile description that gives us information about your competences and suitability for the implementation of the assignment, including meaningful CVs. For data protection reasons, we ask you to send the CVs as a separate file;
- b) Methodology and work plan for performing the assignment;
- c) Detailed reference list indicating the scope and magnitude of similar assignments;
- d) Registration and other relevant statutory documents required;
- e) Financial proposal showing clearly the budgeted cost for the work to be conducted (to be submitted in a separate document from the technical proposal);
- f) The preferred format for the submission is PDF for technical proposal and Excel for the budget proposal. Technical and Financial proposals will need to be submitted as separate documents.

WFTO Africa & ME will provide equal opportunity to all candidates based on merit irrespective of race, gender or any other characteristic protected by applicable law.

Interested consultancy Individuals/ firms and individuals are requested to submit their technical and financial proposals to info@wfto-africa.org by 25th September 2020 at 5:00 PM E.A.T. Proposals received after the close of submission date above will not be considered. The Subject of the email should read - Project Evaluation and Organizational Business Process Reengineering Consultancy – WFTO Africa & ME shall not be liable for not opening proposals that are submitted with a different subject.

Those who have any questions related to the TOR are encouraged to send them to info@wfto-africa.org. Such questions must be received on or before the 21st September 2020. Appropriate responses will be made available via e mail by close of day on the 22nd September 2020. No telephone inquiries shall be responded to.

11.0. Disclaimer

WFTO Africa & ME reserves the right to determine the structure of the process, number of short-listed participants, the right to withdraw from the proposal process, the right to change this timetable at any time without notice and reserves the right to withdraw this tender at any time, without prior notice and without liability to compensate and/or reimburse any party.