SMART Balkans

Civil Society for Shared Society in the Western Balkans

REFERENCE NUMBER NO 001 04/2022

TERMS OF REFERENCE

For development of the Civil Society Organization Capacity
Assessment Tool (CSO CAT)

BACKGROUND INFORMATION

1.1. Current situation in the sector

Governments are increasingly considering civil society organizations (CSOs) as partners, agents of change, strong voice of citizens and powerful element that can influence on different policies and programs, decision makers, public and private sectors, and citizens on national and regional level.

The pivotal role of CSOs is recognized and emphasized in several international agreements today, such as, for example, the Paris Declaration or Aarhus Convention.

But, at the same time, concerns are also raised, and not only by governments, about the accountability of CSOs and their ability to show results and demonstrate impact, to work on transparent, sustainable, effective, and purposeful way.

Civil society, a particularly organized part of civil society, is underdeveloped in the Western Balkans region, despite many completed and ongoing CSO capacity building programs.

Available analysis of the civil sector in the WB region indicates underdeveloped capacities of organizations in various areas, from management sustainability, mobilization of citizens, public relations and the like. But there is no possibility of insight into the individual capacities of the Civil Society Organization to pursue its goal, which makes it impossible to monitor the development of capacities. And this is characteristic of the whole region.

Number of CSOs is constantly growing and currently there are more than 175.000 CSOs in six targeted countries (BCSDN, Monitoring Matrix Report). From the other side, internal resources are scarce because of economic situation and withdrawal of many donor agencies, which is especially dangerous for grassroots organizations. It is increasingly difficult to sustain positive impact of CSOs' activities and support to most vulnerable population, and therefore very much needed use of innovative approaches and use of local resources and methodology that is inclusive and suitable for grassroot organization but also for middle and upper developed CSOs.

Despite the numerous support programs, the capacities are insufficiently developed, but there is a great desire and opportunity for systematic, targeted and needs-based capacity building programs.

Much of the CSO does not develop internal development plans or strategic plans to monitor the organization's life cycle but also to guide its growth. To create a plan of the organization's development, it is necessary to assess in detail not only the opportunities and needs in the working environment, but also the internal characteristics of the organization, strengthens and weakness. It is essential to provide organizations with access to capacity assessment resources to systematically plan their growth, development, networking and operations.

In order to create a quality capacity building program, measure its efficiency and measure the impact of the civic sector, it is necessary to determine the current capacities of the civil society organization. There is, therefore, a growing interest and demand from not only donors, governments, and CSOs' development practitioners but also from a range of CSOs – from large international non-governmental organizations to local community-based organizations, for practical tools to assess and evaluate their performance, and capacity to deliver results and be accountable to their constituents.

OBJECTIVE & EXPECTED RESULTS

1.2. Overall project objective

The overall project objective of which this contract will be a part is as follows:

To contribute to strengthening participatory democracies and Euro Atlantic integrations in the Western Balkans by empowering civil society organizations and CSO networks for stronger and active role in creating peaceful and inclusive societies for sustainable development in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia.

1.3. Deliverables

- Developed and ready to use Civil Society Organization Capacity Assessment Tool (CSO CAT)

  detailed description of CSO CAT methodology will be delivered in the form of final report, including a description of main assessment areas and respective set of indicators, data sources, scoring and description of various levels of performance table of indicators, containing at least 70 pages (Font 12 points, margins 2,5 cm)
- Developed CSO CAT self-assessment tool containing questions and analysis of responses that is suitable for web site and purpose of this tool.
- Developed Manual for Assessors and end users
- Online training for Assessors and project staff related to use of CSO CAT

SCOPE OF THE WORK

1.4. General

1.4.1. Description of the assignment

These are the Terms of Reference for an Expert, or Group of Experts, or Company set up by Centar za promociju civilnog društva (CPCD), and its partners: Center for Research and Policy Making (CRPM) from North Macedonia, and Institute for Democracy and Mediation (IDM) from Albania.

CSO CAT will be comprehensive, practical, and user-friendly tool designed specifically to help CSOs to defined strengths and weaknesses, to have opportunity for independent an overview from a side that should be use for strategic development of the CSO.

This will be a main tool for capacity assessment of applicants for Core grants, and monitoring tool for grant recipients under Core grant line envisaged in the Project.

CPCD, CRPM and IDM have strong experience in conducting different tools and models of capacity assessment, but the Consortium also has experience in main areas of work: security and stability and good governance that should be used jointly with specific experience of selected experts/company.

Online self-assessment CSO CAT will be developed by Expert/ Expert Team/ Company and included at the web platform, publicly available for all interested CSOs. Use of this online tool

will be stretched throughout whole project, and after the project end. Estimated number of CSOs that will use this tool is at least 500. Online self-assessment will help CSOs to rate their own organization's capabilities on a set of selected factors that influence performance, this in entire confidentiality. Offline CSO CAT will be used by Assessors and project staff, and at least 80 civil society organization will use CSO CAT full version (assessment and monitoring).

CSO CAT should be a systematic and easy-to-use assessment tool that can provide qualitative and quantitative overview of the internal administrative, financial, security, human resources, mobilization of the citizens, public relationships, management capacities but also should provide an overview of the role and type of the organization in accordance with the main programs, projects, activities, and results achieved in the last 5 years.

This tool will have four purposes:

        a. Capacity assessment of potential grantees
        b. Self – assessment of all applicants and interested CSOs
        c. Data sources for basic analysis of CSO sector
        d. Measuring the progress or impact of capacity building and grant programs on organizational development

1.5. Specific work

Under the direct supervision and guidance of the Project Manager and in consultations with National Project Coordinators, the Expert/Group of Experts/ Company will conduct the following tasks:

TASK	DEADLINE
Participate at the introductory meeting	5 April 2022
Propose a draft outline of the CSO CAT methodology	16 April 2022
Collect the relevant practical examples, cases, figures, statistics etc. from the Civil Society context in the region	20 April 2022
Develop a final version of the CSO CAT methodology	30 April 2022
Develop a self-assessment tool based on CSO CAT methodology	9 May 2022
Deliver one day training to the SMART Balkans project staff	11 May 2022
Deliver one day training to the SMART Balkans external assessors	To be determined
Provide additional explanation and support for IT expert who will be responsible for IT solution of online self-assessment tool	By the end of June

<u>In total: 25 working days</u>

REQUIREMENTS

1.5. Key experts/group of experts/company should

a) Act in her/his personal capacity;

b) Holder of at least a University Degree in management, development studies or equivalent (plus organizational profile)

c) Have demonstrated and recognized expertise relevant to the field of work, in particular regarding tasks described in the terms of reference. She/he shall have documented her/his competence through a self-declaration, recommendations and any other appropriate documentation;

d) Have recognized experience and/or knowledge relevant to this scope of work;

e) Demonstrate relevant working experience of at least three years on methodological issues and/or capacity building in area of CSO development and/or entrepreneurship;

f) Demonstrate technical/scientific expertise, inter alia through publications.

g) Fluency in English;

h) Good analytical, writing, and reporting skills.

Note that civil servants and other staff of the public administration of the partner country, or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

1.6. Facilities to be provided by the Contractor

The Contractor will ensure that experts are adequately supported and equipped. In particular it will ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It will also transfer funds as necessary to support their work under the contract and to ensure that its employees are paid regularly and in a timely fashion.