

Request for Proposals

Consultancy to develop a Partner Learning Approach and Plan

Laudes Foundation is inviting proposals from consultants to build out its partner learning approach and implementation plan. **Complete proposals must be submitted by 9 AM CET on Monday, September 20th 2021.** More details are given below.

1. Introduction

a. Introduction to the consultancy

Laudes Foundation is commissioning a consultant(s) to build out a partner learning approach. Laudes Foundation has selected a group of Learning Champions (members of the Partner Learning working group), representing the various programmatic teams, to accompany the consultant(s) and contribute to the design of the approach.

The process to develop the partner learning approach should include: a desk review of good practices in partner learning (benchmarking other foundation and grant-making organisations); a mapping of existing Laudes Foundation partner learning activities/processes (highlighting gaps/opportunities) and consultations with partners on their learning needs.

The partner learning approach should include an implementation plan to operationalize the activities. The approach should also include guidelines for a *Partner Learning Fund* that partners can access to receive support for specific learning activities. The guidelines for the Fund should include all necessary templates to enable the launch of the Fund by the end of the consultancy.

Laudes Foundation aims to build a relationship of trust and openness with partners by investing the necessary resources and skills to support partner learning. The development of a partner learning approach will support Laudes Foundation and partners on their shared learning journey.

b. Introduction to Laudes Foundation

Laudes Foundation is an independent foundation here to advance the transition to a and regenerative economy. We do this by supporting brave action that will inspire and challenge industry to harness its power for good. Action that inspires industry, to work collaboratively to create solutions and tools. And action that challenges industry, holding it to account and incentivizing change.

Founded in 2020, Laudes Foundation is part of the Brenninkmeijer family enterprise and builds on six generations of entrepreneurship and philanthropy. In particular, we advance the industry-changing work of C&A Foundation. Learning from these experiences, we to work persistently and collaboratively to influence capital and transform industry, starting with the built environment and fashion industries. Laudes Foundation has the primary purpose of redefining value to address global inequality and climate breakdown.

c. Introduction to Laudes Foundation's Learning Strategy

Laudes Foundation is on a mission to become a learning organisation. The foundation has developed an organisational learning strategy to sharpen its strategic focus, test its assumptions and support the adaption of its operations. The strategy also supports the teams to share lessons across the foundation. At the center the learning strategy is the learning agenda, which will guide the organisation as it embarks on its learning journey. The learning agenda is composed of the learning questions the foundation seeks to answer, the learning processes to support answering those questions, and the learning products to capture the insights that emerge.

As part of the broader organisational learning strategy, Laudes Foundation seeks to build a learning culture with partners by institutionalising trust-based and partner-centered approaches to learning. One of the objectives of the consultancy is to provide the necessary inputs, views, insights and internal stock-taking to build out an effective partner learning approach that will sit within the broader organisational learning strategy.

Laudes Foundation is seeking consulting support to build out a partner learning approach and plan in a robust, practical and tangible way that reflects the needs of the partners, and is rooted in and draws from good practices across the field of philanthropy.

The terms of reference present the purpose and scope; objective and key questions; methodology; process; deliverables; and consultant qualifications and projected level of effort.

All deliverables should be completed and submitted to Laudes Foundation by **24 January 2022**.

2. Objectives and scope of the study

The objectives and scope of the consultancy are as follows:

Diagnosis and Benchmarking phase:

- Understand the expectations of the Laudes Foundation Partner Learning Champions (LC's);
- Understand and document the current partner learning approaches in the foundation jointly with the Partner Learning Working Group and identify opportunities or barriers for partner learning;

- Review external partner learning approaches, best practices, and models that embed learning at the center of organisational culture and practice;
- Work with the Learning Champions (Partner Learning working group) to design a data collection tool (e.g. survey, listening sessions etc.) to source partner learning needs – covering but not limited to the following topics:
 - *What do partners want to learn about – what does a partner-led learning and research agenda look like?*
 - *How can Laudes Foundation more effectively support partner learning?*
 - *What concrete examples do partners have of where their learning has contributed to increased effectiveness and impact?*
- Identify areas of focus for partner learning based on Laudes Foundation’s organisational learning strategy, GESI Learning Partnership results and information being collected through Laudes Foundation’s grant management system and monitoring and evaluation;
- Review and align with the non-monetary assistance provided by Laudes Foundation through ONE as well as take into account the existing related resources
- Map mechanisms already in place (formal or informal) used by the partners (and supported by the teams) to learn and analyse their effectiveness (include a visual product)
 - Out of this mapping, identify good practices in learning and common elements that are already in place and should be retained, improved or discarded;
- Make operational recommendations on how Laudes Foundation can adapt its learning approaches/grant-making practice and funding strategies to remove constraints on partner learning and support more effective learning;
- Develop a guidance note for program teams to assist them to pilot a few key partner learning activities or processes;
- Benchmarking with three other Foundations and/or grant-making organisations. This should include in-depth calls, accompanied by the Senior Org. Learning Manager where possible. The benchmarking review will also include in-depth analysis of the key elements of their strategies and a summary of the findings;
- Identify best practices across the philanthropy field in terms of partner learning methods and innovative practice;
- To inform the partner learning sub-group about the relationship between partner learning and grant making practice.

Develop Partner Learning Approach (including guidance for the Partner Learning Fund)

- Develop, based on the diagnosis phase, the benchmarks and field analyses a partner learning approach for the foundation;
- The partner learning approach should include:
 - An assessment of existing constraints to partner and operational recommendations for addressing these (especially highlighting the differing approaches for national CSOs and global organisations)

- An assessment of current approaches to partner/grant monitoring and reporting and barriers and opportunities for embedding learning into these systems
- Guidance for program teams to pilot partner learning processes/activities
- A framework for providing financial and non-financial support to partners for:
 1. Learning in partnership *with* Laudes Foundation
 2. Building learning capacity within their *own* organisations
 3. Enabling partners to engage in learning activities with the *broader field*
- A monitoring and evaluation framework to assess the effectiveness of the proposed activities to strengthen partner learning capacities and practices

Implementation Plan:

- Propose a concrete implementation plan to bring operationalise the partner learning approach
- Propose clear Roles & Responsibilities, feasible timelines and 1-2 quick wins for 2022 (the plan should be carefully discussed the Learning Champions Partner Learning sub-group)

Both the Partner Learning Approach and the Implementation Plan need to:

- Be realistic, given the concurrent priorities in place for Laudes Foundation and time constraints of teams and partners
- Be flexible enough to be adjusted along the way, as needed
- Align with the broader Organisational Learning and Effective Philanthropy strategies
- Align with the non-monetary assistance provided by Laudes Foundation through ONE as well as take into account the existing related resources
- Leverage the work done as part of the GESI Learning Grants
- Consider genuine participation and engagement of the team members in the process
- Maximize the use of tools and forums already in place (like Evaluations; After Action Reviews; Partner Learning Reports; Partner CoPs; Partner Meetings etc.)
- Employ trust-based, innovative and creative approaches to partner learning

3. Proposed Methodology

The consultancy will base its work in the review of existing documents, key interviews and benchmarking analysis.

<p>Document review</p>	<ul style="list-style-type: none"> • Programmatic strategies and annual plans (Teams: Fashion, Labour Rights, Built and Finance and Capital Market Transformation) • Effective Philanthropy Strategy and the Organisational Learning Strategy • Sample of different types of Monitoring & Evaluation reports: summary of lessons learnt, AARs (After Action Reviews), Partner Learning Reports • Evaluation Rubrics • Sample of supporting documents of learning mechanisms already in place (e.g. Team Learning Agendas, Agenda of the Learning Offsite/Fail Fest) • GESI Learning Partnership results/approach • Laudes Foundation’s <i>Learning Fund for Partners</i> (existing guidelines) and resources available for partner capacity building through Organisational and Network Effectiveness (ONE) • Overall Effectiveness Evaluation particularly the chapters related to M&E and Learning • Partner Perception Report • Review of Laudes Foundation’s learning portal content (Laudes Learns) • Review of the WP Channel posts
<p>Semi-structured Interviews/FGDs</p>	<ul style="list-style-type: none"> • Interview with key Laudes Foundation staff (10) • FGD with Learning Champions (Partner sub-group) • Interview with the communications business partner for EP Team. • Interview with partners • Interview with relevant governors
<p>Partner data collection</p>	<ul style="list-style-type: none"> • Survey; listening sessions etc.
<p>Benchmarking analysis</p>	<p>Conduct 3 benchmarking analysis with other foundations non-profit or grant-making organisations engaged in innovative and trust based partner learning activities. This</p>

	should include in-depth calls, accompanied by the Senior Organisational Learning Manager or Laudes Foundation Learning Champion, whenever possible. The benchmarking review will also include in-depth analysis of the key elements of their strategies and a summary of the findings
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4. Roles and Responsibilities

The Learning Champions (led by the Senior Organisational Learning Manager) are responsible for:

- Overall responsibility and accountability for management and delivery of the partner learning approach and implementation plan up to and including approval.
- Technical guidance for the consultants throughout the process, including participation / observation of interviews / benchmarking meetings
- Leadership of the review process of both the Approach and the Plan, including collating comments and facilitating discussion and management responses
- Accountability and communication of the process to the wider Foundation

The consultants are responsible for:

- Conducting all necessary assessments, interviews (in coordination with Learning Champions) and benchmarking analysis
- Logistics for the information collection, including travel, scheduling, hosting interviews (as necessary)
- Day-to-day management
- Regular formal and informal reporting to the Learning Champions
- Participation in key review-related meetings (kick off meeting, draft learning approach presentation meeting)
- Production of deliverables (a) Partner Learning Approach and (b) Implementation Plan – in accordance with the Terms of Reference and contractual arrangements

The evaluation consultants will report to Ms. Denise Brennan, Laudes Foundation on all issues related to the scope of this contract, including legal documents, fees and expenses, deliverables and commenting / responses processes.

5. Process, Deliverables & Timeline

The consultancy will be carried out between September 2021 and January 2022. The expected timeframe for the key outputs are as mentioned below:

Process		Responsibility
Selection and contracting of consultancy	By 30 September 2021	Laudes Foundation Learning Champions (Partner Learning sub-group); Snr Org. Learning Manager
Completion of documentary review, interviews, surveys and benchmarks	By mid-November 2021	Consultant Team
Report on the findings of the Diagnosis and Benchmarking phase	29 November 2021	Consultant team
Draft of the Partner Learning Approach and Implementation Plan for comment	Mid-December 2021	Consultant Team, Learning Champions (Partner Learning sub-group), Snr Org. Learning Manager
Discussion meeting for refinement of the Partner Learning Approach and Implementation Plan	Week of January 10 th 2022	Key Laudes Foundation staff (Programs, EP), Learning Champions (Partner sub-group), Snr. Org. Learning Manager
Final revised Partner Learning Approach and Implementation Plan	24 January 2022	Consultant Team / Snr. Org. Learning Manager, Learning Champions (Partner sub-group) (approval)
Dissemination to the wider Foundation and implementation of Learning Fund	End of January 2022	Learning Champions (Dissemination sub-group) and Laudes Foundation Communications

The consultant will submit the following deliverables:

- Partner data collection plan/tools
- Report on the findings of the diagnosis and benchmarking phase
- Mapping of gaps and opportunities (including visual output)

- Partner Learning Approach and Implementation Plan – draft and final (in ppt format) with accompanying tools, templates and guidelines (e.g. for program teams to launch learning activities)
- Partner Learning Fund architecture, guidelines and templates

6. Level of Effort & Consultant Requirements

The expected level of effort is approximately 60 working days:

Consultants are expected to meet the following requirements:

- Demonstrated experience in organisational learning, partner/grantee learning, strategy development, change management and partner capacity building;
- Prior experience of designing and implementing a strategic and operationally relevant partner learning approaches
- A track record of assisting foundations and non-profits on issues of organisational/partner learning;
- Demonstrated ability to produce;
- Ability to work under pressure and tight deadlines without sacrificing quality deliverables;
- Excellent facilitation and communication skills (including the use of visual and creative methods of capturing/disseminating results);
- Understanding of the sectors Laudes Foundation is working on
- Excellent written and verbal presentation and facilitation skills in English
- Experience of conducting partner learning workshops will be desirable
- No conflict of interest with the Laudes Foundation

The following competencies and traits are required:

- Skilled communicators with excellent observation, research, analysis and synthesis capabilities;
- Ability to engage with diverse range of partners such as private sector, multi-laterals, grassroot organisations, and be able to be empathetic to their learning needs
- Comfort with understanding a range of context-specific evidence sources, and learning approaches across diverse sectors , geographies and partners.
- Expertise in working with partners based in Asia, Europe and Brazil
- Have ability to engage a diverse range of internal and external stakeholders, across and within multiple levels of an organisation,

7. Submission guidelines

- Please submit your proposal-technical and financial to Denise Brennan, Senior Organisational Learning Manager, d.brennan@laudesfoundation.org, Laudes Foundation by **9 AM CET on Monday, September 20th 2021.**

For Proposal Submission:

a. Technical

- Understanding of the TOR and the requirements of the study (narrative proposal of no-more than 8 pages excluding annexes)
- Approach and methodology
- Key deliverables and timeline of the study
- As **annexures** – please include:
- Key personnel and staffing, and relevant expertise/experience of the staff of relevance to the TORs
- Please provide two samples relevant work to the TORs previously completed by the consultant individual or organisation (to be used only for purposes of selection)
- Two references

b. Financial Proposal

- The financial proposal should include a line-item budget and budget narrative with cost estimates in **Euros** (€). The financial proposal must be prepared as a separate file and should contain a break-up of professional fees along with any estimated out of pocket expenditures (e.g., travel). The expected level of effort for the consultancy must be based on the projected level of effort in days. The estimated level of effort proposed must be aligned with the proposed approach and methodology.