

TERMS OF REFERENCE

TITLE – *please indicate the title of the consultancy in line with the signed ToR*

CONTRACT MODALITY Partnership Data Management and Business Intelligence Consultant

DUTY STATION Rome – Home based

DURATION OF CONTRACT 7.5 months

Purpose of Assignment

UNICEF PFP's Foundations and FMBO Team supports a growing and increasingly complex portfolio of strategic partnerships, grants and opportunities with foundations, faith-based organizations and other partners. As this portfolio expands, there is an urgent need to improve the quality, completeness and accessibility of partnership data so that PFP, Regional Offices, Country Offices, National Committees and Centres of Excellence can make timely, informed decisions and manage partnerships more effectively.

Scope of Work

The consultancy will run as a single continuous engagement from mid-November to Mid-May 2027 and will be structured around two key focus areas.

Focus Area 1: Partnership and Grant Data Clean-Up

The consultant will lead a structured clean-up of Private sector FFMBO's partnership and grant data, with a particular focus on ensuring that all key partnerships, grants and opportunities are accurately and comprehensively reflected in UNISON. This will include working with Regional Offices, Country Offices and National Committees to collect, verify and update missing or incomplete information, and undertaking direct data input where markets or offices are unable to complete the required updates themselves.

The consultant will also review and validate financial and FRM information to ensure that income, pipeline, grant status, partner details and related information are consistent, accurate and usable for portfolio management, reporting and decision-making. The consultant will establish an SOP for updates and maintenance of UNISON data for future work working closely with UNISON team.

Focus Area 2: Data Access, Dashboards and Business Intelligence

The consultant will support FFMBO and key stakeholders to access partnership information quickly and helpfully by ensuring the existing dashboards are optimized. These dashboards should provide clear, implementation-focused visibility on the portfolio and enable users to understand income performance, year-on-year trends, pipeline value and likelihood, partner and donor net contributions by outcome area, money under management, lapsed partners and related grants, grants under contracting and contracting progress, and where feasible, implementing partners and CSOs.

The consultant will ensure that dashboards are practical, user-friendly and aligned with the information needs of Partnerships including FFMBO team, working closely with the Fundraising Intelligence Unit and UNISON team.

Similar work may also be assigned in relation to other income streams depending on the needs of the organization.

Work Assignments Overview	Deliverables/Outputs	Delivery deadline
Partnership and Grant Data CleanUp • Map priority PFP partnerships from FFMBO partnerships, grants and opportunities requiring data clean-up or updates in UNISON. • Work with Regional Offices, Country Offices and National Committees to collect, verify and complete missing partnership and grant information. • Undertake direct UNISON data input where markets or offices are unable to complete required updates. • Review and validate financial information including FRM information, thematic and grant data to ensure accuracy and consistency across systems. • Inventory and analyse donor intelligence maintained outside UNISON, including spreadsheets, SharePoint	Deliverable 1 • Cleaned and updated list of priority partnerships, grants and opportunities in UNISON. • Completed data entry for agreed priority partnerships and grants, including missing partner, grant, pipeline, income and status information. • Validated FRM data set with identified gaps, corrections made and unresolved issues documented for follow-up. • Identify systemic barriers in data quality for example NCEs being manual inputs in Vision • Simple data quality log and handover note summarizing updates completed, outstanding actions and recommendations for ongoing data maintenance. • Upload-ready data migration files.	30.06.2027. -63 days
Data Access, Dashboards and Business Intelligence • Identify priority information needs FFMBO. • Adapt existing dashboards and data views to make partnership and grant information accessible and actionable. • Ensure dashboards provide visibility on income to date, year-on-year trends, pipeline values and likelihoods, partner and	Deliverable 2 • Improved dashboards covering agreed priority indicators, including income, year-on-year trends, pipeline, outcome-area contributions, money under management, lapsed partners, grants under contracting and contracting progress. • User-friendly data views tailored to the needs of GAO, ROs, COs, NatComs and relevant	30.06.2027. -42 days

donor net contributions by outcome area, money under management, lapsed partners and grants, grants under contracting and contracting progress, and other relevant portfolio information. • Where feasible, incorporate information on implementing partners and CSOs to support implementation-focused portfolio management.	Centres of Excellence. • Brief user guidance and handover materials to support ongoing use, interpretation and maintenance of dashboards as well as around processes for NCEs, underspend, pooled fund, etc. and any relevant considerations. • Recommendations for improving longer-term data governance, data entry discipline and dashboard maintenance. • Donor Intelligence Assessment Report. • Gap Analysis and Data Quality Review. • Intelligence Source Mapping and Integration Procedures taken.	
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Payment Schedule:

Payment will be made on submission and acceptance of deliverables. UNICEF reserves the right to withhold payment in case the deliverables submitted are not up to the required standard or in case of delays in submitting the deliverables on the part of the consultant.

Important Notes

- Individuals engaged under a consultancy or individual contract will not be considered “staff members” under the Staff Regulations and Rules of the United Nations and UNICEF’s policies and procedures and will not be entitled to benefits provided therein (such as leave entitlements and medical insurance coverage). Their conditions of service will be governed by their contract and the General Conditions of Contracts for the Services of Consultants and Individual Contractors. Consultants and individual contractors are responsible for determining their tax liabilities and for the payment of any taxes and/or duties, in accordance with local or other applicable laws.
- The selected candidate is solely responsible for ensuring that the health insurance (and visa if applicable) required to perform the duties of the contract are valid for the entire period of the contract. Selected candidates are subject to confirmation of fully-vaccinated status against SARS-CoV-2 (Covid-19) with a World Health Organization (WHO)-endorsed vaccine, which must be met prior to taking up the assignment. It does not apply to consultants who will work remotely and are not expected to work on or visit UNICEF premises, programme delivery locations or directly interact with communities UNICEF works with, nor to travel to perform functions for UNICEF for the duration of their consultancy contracts.

- UNICEF offers reasonable accommodation for consultants with disabilities. This may include, for example, accessible software, travel assistance for missions or personal attendants. We encourage you to disclose your disability during your application in case you need reasonable accommodation during the selection process and afterwards in your assignment.

**QUALIFICATIONS / SPECIALIZED KNOWLEDGE / EXPERIENCE/ COMPETENCIES
(CORE/TECHNICAL/FUNCTIONAL) / LANGUAGE SKILLS REQUIRED FOR THE ASSIGNMENT**

- **Minimum requirements:**
 - **Education:** Bachelor's - Advanced university degree in economics, business administration, data analytics, information management, international development, public policy, finance, or related field. A first-level university degree in a relevant field combined with two additional years of qualifying professional experience may be accepted in lieu of the advanced degree.
 - **Work Experience:**
 - Minimum 5 years of professional experience in partnership data management, finance, business intelligence or related fields.
 - Demonstrated experience cleaning, validating and maintaining complex partnership, grant, income or pipeline data across multiple stakeholders and systems.
 - **Skills:**
 - Strong working knowledge of Salesforce, and SAP systems, FRM or comparable Customer Relationship Management and grant s management systems is strongly preferred.
 - Proven ability to design and develop practical Power BI dashboards or similar business intelligence products for non-technical users.
 - Strong analytical, coordination and problemsolving skills, with the ability to work across Regional Offices, Country Offices, National Committees and global teams to resolve data gaps and inconsistencies.
 - **Language Requirements:** Excellent written and verbal communication skills; fluency in English required.
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