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TERMS OF REFERENCE

Planning and Analytics Consultant

CONTRACT MODALITY	Individual Consultancy
DUTY STATION	Remote/ Reporting to Rome
DURATION OF CONTRACT	12 Months

Purpose of Assignment

The Individual Giving (IG) team in the Division of Private Fundraising and Partnerships (PFP), based in Rome provides global support to over 50 UNICEF fundraising National Committees (Natcoms) and Country Offices (COs). The IG team is seeking a Planning and Analytics Consultant with capabilities in planning and metrics development and monitoring to join the Individual Giving Fundraising Team, Division of Private Fundraising and Partnerships (PFP).

In this role, the hired consultant will be responsible for planning and validating IG activities with a focus on Individual Giving fundraising performance. Candidates with a business performance analysis background will be highly suitable.

The purpose of this consultancy is to strengthen strategic planning, performance management, and data-driven decision-making across UNICEF's global Individual Giving operations. Through comprehensive analysis of financial and operational performance, the consultant will provide actionable insights to identify growth opportunities, address performance challenges, and optimize resource allocation and investments. The role will focus on developing standardized performance metrics, integrating multiple data sources, identifying emerging trends, and assessing the effectiveness of strategies, processes, and initiatives. Working collaboratively with stakeholders across HQ, Regional Offices, and Country Offices, the consultant will support a more holistic understanding of global Individual Giving performance, enabling informed strategic decisions that drive sustainable revenue growth, operational efficiency, and long-term fundraising value.

Scope of Work

Main tasks:

1. Performance Monitoring and Strategic Analysis: Conduct regular, comprehensive analyses of global Individual Giving performance, integrating financial, operational, and donor data, including Rich Data Metrics and Rich Legacy Metrics. Identify key trends, performance gaps, growth opportunities, and emerging risks, translating findings into actionable insights to support strategic planning, investment decisions, and sustainable net revenue growth.

2. Performance Measurement and Standardization: Develop and maintain a comprehensive performance management framework, including standardized KPIs, definitions, methodologies, and analytical tools. Integrate data from multiple sources to enable consistent performance measurement across markets and channels, with a focus on profitability, donor lifetime value, investment efficiency, and long-term financial sustainability.

3. Business Performance and Optimization: Conduct root cause analyses of performance challenges and assess the effectiveness of fundraising strategies, operational processes, and investments. Identify opportunities to improve efficiency, optimize resource allocation, and maximize fundraising returns. Evaluate the impact of strategic initiatives and provide recommendations for continuous improvement.

4. Strategic Analytics Roadmap: Develop and maintain a prioritized roadmap to strengthen Individual Giving's

analytical capabilities, identifying critical business questions, data gaps, reporting needs, and opportunities for improvement. Define clear priorities and milestones aligned with global fundraising ambitions and evolving business needs.

5. Knowledge Management and Capability Building: Develop accessible knowledge resources, KPI guidance, and analytical methodologies to strengthen data literacy and performance management capabilities across the Global Individual Giving team. Facilitate knowledge-sharing and practical learning opportunities to promote a common understanding of performance metrics and their application in strategic and operational decision-making.

6. Stakeholder Engagement and Strategic Advisory: Collaborate with stakeholders across HQ, Regional Offices, and Country Offices to understand analytical needs, validate findings, and translate complex data into clear, relevant recommendations. Support leadership and market teams in applying performance insights to strategic planning, investment prioritization, and performance improvement.

Work Assignments Overview	**Deliverables/Outputs**	**Delivery deadline to complete the deliverable**
Month 1 – January 2027	**Deliverable 1** – RDM: Coordinate with markets, consultants, and agencies; initiate year-end data collection; provide guidance on reporting requirements and submission timelines. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 January 2027 (21 Days)
Month 2 – February 2027	**Deliverable 2** – RDM: Consolidate market submissions, monitor progress, conduct data quality checks, and coordinate corrections with markets and technical partners. Annual Performance Analysis: Deliver year-end analysis of growth and decline drivers, trends, and strategic implications. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 February 2027 (20 Days)
Month 3 – March 2027	**Deliverable 3** – RDM: Complete data consolidation, quality assurance, and Power BI validation; finalize reporting outputs and communicate results to markets. KPI Analysis and Performance Management:	20 March 2027 (23 Days)

	Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	
Month 4 – April 2027	**Deliverable 4** – Q1 Performance Report: Deliver global IG performance analysis, including trends, key drivers, and strategic recommendations. Knowledge Sharing: Conduct the first internal KPI and RDM workshop. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 April 2027 (22 Days)
Month 5 – May 2027	**Deliverable 5 -** Integrated Reporting: Deliver improvements combining data from multiple UNICEF sources to strengthen consistency, comparability, and holistic performance analysis. Knowledge Sharing: Conduct the first RDM workshop for Country Offices and National Committees, covering finalized results and KPI interpretation. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 May 2027 (21 Days)
Month 6 – June 2027	**Deliverable 6** – RDM: Coordinate the mid-year reporting cycle with markets, consultants, and agencies; initiate data collection and provide reporting guidance. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 June 2027 (22 Days)
Month 7 – July 2027	**Deliverable 7** – RDM: Consolidate market submissions, monitor progress, conduct quality checks, and coordinate corrections. Q2 Performance Report:	20 July 2027 (22 Days)

	Deliver global IG performance analysis, highlighting trends, growth drivers, risks, and strategic implications. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	
Month 8 – August 2027	**Deliverable 8** – RDM: Complete mid-year data consolidation, quality assurance, and Power BI validation; finalize reporting and communicate results. Latest Estimates 2 (LE2): Deliver forecast analysis, including trends, underlying assumptions, major variances, and implications for year-end performance. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 August 2027 (22 Days)
Month 9 – September 2027	**Deliverable 9** – Knowledge Sharing: Conduct the second internal KPI and RDM workshop, focusing on performance interpretation and application of insights. Deliver the second RDM workshop for Country Offices and National Committees, covering finalized mid-year results. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 September 2027 (22 Days)
Month 10 – October 2027	**Deliverable 10** – Q3 Performance Report: Deliver global IG performance analysis, identifying key trends, growth and decline drivers, emerging risks, and opportunities for strategic action. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure,	20 October 2027 (21 Days)

	support financial planning, cost savings, budget allocations, and Investment Fund request and utilization.	
Month 11 – November 2027	**Deliverable 11** – Latest Estimates 3 (LE3): Deliver performance and forecast analysis, including trends, underlying assumptions, explanations of major variances, and implications for year-end results. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 November 2027 (22 Days)
Month 12 – December 2027	**Deliverable 12** – Annual Analytics Review: Deliver consolidated performance findings, lessons learned, data improvement priorities, and recommendations for the following year's analytics roadmap. KPI Analysis and Performance Management: Support KPI definition, alignment, data extraction, interpretation, and analysis across IG teams and other units. Budget Monitoring and Planning: Monitor expenditure, support financial planning, cost savings, budget allocations, and Investment Fund utilization.	20 December 2027 (23 Days)

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:** Advanced university degree (Master's degree or higher) in Business, Statistics, Technology, Computer Science, or a relevant field is required.

  Alternatively, a first-level university degree (Bachelor's degree or higher), in combination with an additional qualifying 2 years of relevant work experience, may be accepted in lieu of an advanced university degree.

- **Work Experience:**

  -A minimum of eight (8) years of relevant professional work experience in business planning and analytics or related fields or equivalent is required.

  -Experience in managing large data sets and analytics projects is required.

- **Skills :**

  -Strong analytical skills and ability to make data-driven decisions to prioritize net revenue growth are required.

  -Track record of profitable ecommerce/ fundraising growth from strategic decisions is required.

  - In-depth knowledge/experience of data analysis/insights techniques, including marketing metrics, attribution modelling, tracking, paid media and retention-based metrics is required.

  -Ability to work with ICTD colleagues at an enterprise level to ensure solutions meet minimum compliance/security standards is required.

  -Excellent communication, negotiation and collaboration skills are required.

  -Passion for making a difference in the lives of children.

  -Comfortable working in an Agile environment is an asset.

  Language Requirements: Fluency in English is required. Knowledge of another official UN language is considered an asset.

  Additional skills and attributes (all considered assets):

  - Highly organised and strong attention to detail.

  -Proven knowledge of advanced Excel.

  -Proven knowledge of Power BI.

  -Demonstrated ability to:

  - Think end-to-end
  - Manage long-term projects
  - Manage short-term deadlines

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