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TERMS OF REFERENCE

Finance Capacity-Building Consultant

CONTRACT MODALITY	Individual Consultancy
DUTY STATION	Rome, Italy (Remote)
DURATION OF CONTRACT	6 months

Purpose of Assignment

The Global Foundations and Faith and Membership-Based Organizations (FFMBO) team is located within UNICEF's Private Fundraising and Partnerships (PFP) Division. The team works with leading and emerging foundations, faith-based organizations and membership organizations to increase financial investment for children, exchange knowledge and technical expertise, advocate for children's rights, and leverage partners' influence, networks and financing.

As the scale and complexity of these partnerships grow, colleagues require consistent, practical approaches to developing, reviewing and managing complex budgets; linking financial plans to partnership results; monitoring expenditure and performance; and communicating financial information clearly to internal stakeholders and partners.

The consultancy will strengthen the FFMBO team's finance capacity in relation to partnerships. The consultant will assess current knowledge, tools and practices; create a standardized suite of finance templates for complex foundation budgets and results tracking; deliver applied training for all FFMBO colleagues; and assess learning to confirm that colleagues are comfortable using the tools and have a strong understanding of the relevant financial concepts and processes.

The consultant will also develop a complete suite of reusable training materials that can be delivered through the Fundraising Academy for the wider UNICEF partnership ecosystem.

Overall objective: Build sustainable, consistent and practical partnership-finance capability across the FFMBO team, while creating scalable tools and learning products that strengthen financial management of complex partnerships across the wider ecosystem.

The assignment will be developed in close consultation with FFMBO colleagues and relevant finance, results and learning stakeholders. Outputs should reflect UNICEF requirements, be practical for day-to-day partnership management, and be sufficiently adaptable for use across different foundation partnership models and markets.

Scope of Work

1. Inception and capacity assessment

- Review relevant UNICEF financial guidance, existing partnership tools, representative complex foundation budgets and results frameworks.
- Review internal UNICEF financial processes for Partnership financial tracking using existing UNICEF tools
- Consult FFMBO colleagues and relevant internal stakeholders to identify priority competency gaps, recurring challenges and practical use cases.

- Develop a document comprehensively capturing holistic financial systems, tools, tracking and reporting mechanisms and find the linkages across these areas. Include a Finance stakeholder map aligned to the finance systems mapping
- Establish a baseline assessment and agree a detailed workplan, learning objectives and success measures.
- Create a Competency Framework Crosswalk to map each required competency to:
  - The specific tool/template/module
  - Learning pathway content (academy-ready)
  - Common use cases

2. Finance guidance suite

- Develop a user-friendly suite of standardized ”how to “guidance and decision tools for complex foundation budgets, budget narratives, scenario planning, expenditure monitoring, forecasting and results tracking. Including a section on budget negotiation tactics with partners.
- Include clear instructions, quality checks, worked examples and guidance on adapting the tools to different partnership arrangements.
- Develop a checklist for Quality Assurance and Review Protocol to ensure:
  - Completeness of partnership budgets and narratives
  - Alignment between budget lines and results framework

  Plausibility checks for forecasts
  - Common errors and how to fix them
  - Suggested workflow for internal review/approvals.
- Develop a Learning & Tools Repository Inde and incorporate the following
  - A proposed folder structure and naming conventions and versioning approach
  - Location guidance (e.g., UNICEF SharePoint)
- Pilot and refine the guidance and tools with FFMBO colleagues and relevant technical counterparts.

3. Team training and learning assessment

- Design and facilitate practical, participatory training and practical job-shadowing for all FFMBO colleagues using realistic partnership scenarios and the new guidelines.
- Create a Job-shadowing observation rubric and anonymized log to Define what behaviors/actions are observed (e.g., budget negotiation steps, forecasting logic, monitoring cadence) and to Capture baseline behaviors and improvement areas.
- Create a Training Evaluation Report and Evidence Dashboard template to consolidate the results of the following to ensure colleagues are comfortable applying the guidance and the tools and demonstrate a strong understanding of core finance concepts and processes
  - Pre-/post-assessments (quantitative and qualitative)
  - Performance in scenario exercises
  - Confidence/self-efficacy survey (optional)
  - Lessons learned and recommendations
- Develop a post training Finance FAQ & Troubleshooting Guide to capture Common issues and recommended resolutions:
  - “Budget not aligned with results—what now?”
  - “Partner reporting differs from UNICEF tracking—how to reconcile?”
  - “What to do when partners request budget re-phasing?”
- Document learning results, remaining gaps and recommendations for sustained capability development.
- Create a menu of internal and external learning resources to facilitate integrating broader skill sets
- Create a maintenance & Update Plan to define:
  - Who reviews feedback
  - How updates are triggered (e.g., new partner models)
  - Timeline for review cycles (e.g., 6 months, 12 months)
  - Backward compatibility/versioning approach.

4. Academy-ready Finance Learning Pathway for FFMBO

- Develop a modular suite of facilitator and participant materials for delivery through the Fundraising Academy to the wider partnership ecosystem.
- Provide facilitator guidance, presentation materials, exercises, case studies, assessments, answer keys, reference materials and recommendations for delivery and maintenance.
- Create a Scenario & Case Study Library (Academy-ready) by including 6–12 cases such as:
  - Earmarked grants with restricted cost categories
  - Multi-ye FFMBO funding with phased disbursement
  - Partnership with blended finance elements (if applicable)
  - Budget revisions during implementation
  - Results framework changes requiring budget re-alignment
- Develop *Reusable micro-learning content set to include* short assets (10–15 min each) such as:
  - "How to read and challenge a partner budget"
  - "How to build a budget–results crosswalk"
  - "How to forecast and explain variances"
  - "Budget negotiation: concessions and trade-offs"

The consultant may provide limited follow-up advisory support to embed the tools and respond to agreed implementation issues.

The consultant will report to the designated FFMBO supervisor and work closely with relevant finance, results and Fundraising Academy colleagues. The assignment is remote/home-based.

Work Assignments Overview	Deliverables/Outputs	Delivery deadline to complete the deliverable
Inception and finance capacity assessment Review current tools and practices; consult colleagues; assess baseline knowledge, confidence and priority needs; and confirm the assignment approach.	**Deliverable 1** – **SMART Outputs:** 1) **Inception report** (including UNICEF guidance and tools reviewed) 2) **Stakeholder consultation summary** 3) **Baseline capacity assessment** (knowledge, confidence, priority gaps) 4) **Competency Framework Crosswalk** mapping each competency to tool/template/module and academy pathway **and** use cases 5) **Finance systems/tools/tracking/reporting mapping document** with linkages 6) **Finance stakeholder map** aligned to systems mapping 7) **Agreed workplan and learning objectives and success measures**	15 December 2026 (19 days)
2. Finance guidance suite (templates and QA and repository index)	**Deliverable 2** – **SMART Outputs:** 1) **User-friendly guidance and decision tools** for complex foundation budgets, budget narratives, scenario planning, expenditure monitoring, forecasting, results tracking 2) **Budget negotiation tactics** section 3) **Quality-control checklist and QA review protocol** covering completeness, budget results alignment, forecast plausibility, common errors & fixes, internal review/approval workflow 4) **Learning & Tools Repository Index** including folder structure, naming conventions,	15 February 2027 (46 days)

	versioning approach, and **location guidance (e.g., SharePoint)** 5) Draft tool suite ready for piloting	
3. Guidance and tools package piloting and refinement	**Deliverable 3** – **SMART Outputs:** 1) **Pilot sessions** completed with FFMBO and technical counterparts 2) **Completed test cases** using representative partnership scenarios 3) **Structured feedback log** 4) **Revised, validated guidance suite** 5) Recommendations for **ownership, version control, and periodic review**	15 March 2027 (19 days)
4. FFMBO Team training and learning assessment	**Deliverable 4** – **SMART Outputs:** 1) **Training plan & agenda** 2) Live training and **practical job-shadowing** using realistic scenarios 3) **Job-shadowing observation rubric and anonymized log** capturing baseline behaviors and improvement areas 4) **Training Evaluation Report and Evidence Dashboard template** consolidating pre/post assessments (quantitative and qualitative), scenario exercise performance, optional confidence survey, lessons learned & recommendations 5) **Finance FAQ & Troubleshooting Guide** (budget-results misalignment, partner vs UNICEF tracking reconciliation, budget re-phasing) 6) **Documented learning results and remaining gaps and capability development recommendations** 7) **Menu of**	15 April 2027 (26 days)

	internal/external learning resources 8) **Maintenance & Update Plan** (who updates, triggers, review cycles e.g., 6/12 months, backward compatibility/versioning)	
5. Academy-ready Finance Learning Pathway and handover	**Deliverable 5** – **SMART Outputs:** 1) **Modular facilitator and participant materials** for Fundraising Academy delivery 2) Facilitator guidance, decks, exercises, **case studies and assessments and answer keys and references and delivery/maintenance recommendations** 3) **Scenario & Case Study Library (6–12 cases)** including: earmarked restricted costs, multi-year phased disbursement, blended finance elements (if applicable), budget revisions, results framework changes requiring re-alignment 4) **Reusable micro-learning set** (10–15 min assets): reading/challenging partner budgets; building budget–results crosswalk; forecasting & variance explanation; negotiation concessions/trade-offs 5) **Final handover session** and **final report** summarizing outputs, learning, sustainability recommendations 6) **Limited follow-up advisory support** to embed tools/respond to agreed implementation issues (as per ToR)	15 May 2027 (16 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.
- Contracts are conditional upon the selected candidate's willingness to comply with any current or future vaccination requirements that may be established by UNICEF, where applicable. Failure to comply with applicable vaccination requirements, where required and without an approved medical exemption by UNICEF, may result in the withdrawal of the consultancy offer or termination of the contract in accordance with the General Terms and Conditions of Contract.
- 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**: An advanced university degree in finance, accounting, business administration, economics, international development or another relevant field is required. 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:**
    - At least eight years of progressively responsible professional experience in financial management, budgeting, grant management, partnership finance or a closely related field.
    - Demonstrated experience developing and managing complex, multi-year budgets for foundations, institutional donors or other grant-making partners.
    - Strong experience linking financial planning and monitoring to results frameworks, indicators and donor reporting requirements.
    - Demonstrated ability to design practical finance templates, guidance and quality-assurance tools for non-finance users.
    - Proven experience conducting capacity assessments and designing and facilitating adult learning, including assessments of knowledge and practical application.

  - Experience developing modular, facilitator-ready learning products for online, in-person or blended delivery.
  - Experience working in a complex international organization and familiarity with UNICEF financial, programme and partnership processes are strong assets.

- **Skills:** Excellent analytical, communication, facilitation, collaboration and project-management skills.
- **Language Requirements:** Fluency in English is required. Knowledge of another official UN language—Arabic, Chinese, French, Russian or Spanish—is an asset.
- **Desirables:** A recognized professional accounting or finance qualification is an asset.