

Appendix I: Terms of Reference

Workshop Facilitation, Learning Documentation, Communication and Policy Support Services

- 1. Background of the Assignment:** CARE Bangladesh, in partnership with members of the Start Bangladesh Hub consortium, is implementing the OCHA Anticipatory Action Financing Facility (APHF)-funded project, “Strengthening Cyclone Anticipatory Action in Cox’s Bazar through a Locally Led, Trigger-Based Pooled Mechanism.” The project aims to reduce the humanitarian impacts of cyclones through timely anticipatory actions, including anticipatory cash assistance, evacuation support, shelter preparedness, and community engagement, guided by Bangladesh’s National Early Action Protocol (NEAP) and the OCHA Anticipatory Action Framework.

The project is being implemented through a consortium approach involving multiple international and national partners across cyclone-prone areas of Cox’s Bazar. As implementation progresses, there is a need to systematically capture experiences, document lessons learned, strengthen accountability practices, promote visibility of project achievements, and facilitate dialogue among humanitarian, government, and development stakeholders.

To support these objectives, CARE Bangladesh and the Start Bangladesh Hub seek to engage a qualified consultant/firm to provide facilitation, documentation, communication, learning, and stakeholder engagement support throughout the project period. The assignment will focus on organizing and documenting key learning and reflection events, supporting accountability and communication-related capacity strengthening initiatives, facilitating stakeholder consultations, and producing knowledge and policy products that contribute to wider learning and evidence generation on anticipatory action.

The assignment will also support the Start Bangladesh Hub’s ongoing efforts to promote harmonized partnership and accountability approaches through knowledge sharing and policy dialogue, including analysis of existing due diligence and partnership assurance mechanisms across humanitarian financing platforms and donors.

- 2. Purpose of the Assignment:** The purpose of this assignment is to engage a qualified consultant/firm to provide knowledge management, learning, accountability, communication, and stakeholder engagement support for the implementation of the OCHA APHF-funded Cyclone Anticipatory Action Project in Cox’s Bazar.

The consultant/firm will support CARE Bangladesh, consortium partners, and the Start Bangladesh Hub in documenting project experiences, facilitating learning and reflection processes, strengthening accountability-related knowledge sharing, promoting visibility of project achievements, and generating evidence to inform future anticipatory action programming.

The assignment will focus on organizing and facilitating key workshops, consultation meetings, learning events, and communication initiatives throughout the project lifecycle. The consultant/firm will also support the development of knowledge and policy products, capture implementation lessons and good practices, and facilitate engagement among consortium members, humanitarian actors, government stakeholders, and relevant coordination platforms.

Specifically, the assignment will:

- Support the planning, facilitation, and documentation of workshops related to accountability, learning, project reflection, and outcome harvesting.
- Support consortium-wide communication and visibility efforts by facilitating capacity-strengthening events and producing communication and visibility materials in line with CARE and OCHA requirements.
- Facilitate stakeholder engagement and knowledge-sharing meetings to promote collaboration, learning, and dissemination of anticipatory action experiences.

- Document project achievements, lessons learned, promising practices, and operational insights for internal learning and external dissemination.
- Develop a policy brief examining and comparing different due diligence and partnership assurance approaches used by humanitarian financing mechanisms and donors to support ongoing discussions on DDA Passporting and harmonization.

The assignment will contribute to strengthening learning, accountability, communication, stakeholder engagement, and evidence generation across the project while promoting wider uptake of anticipatory action lessons and good practices.

- 3. Objectives of the Assignment:** To provide technical and logistical support for documenting, disseminating, and promoting learning, accountability, communication, and stakeholder engagement outcomes of the OCHA APHF-funded Cyclone Anticipatory Action Project, thereby strengthening knowledge sharing and evidence-informed practice across the consortium and wider anticipatory action community.

Specific objectives – the consultant/firm will:

- Support the planning, facilitation, documentation, and follow-up of project learning, reflection, and knowledge-sharing events, including lesson-learning workshops, peer review sessions, and outcome harvesting exercises.
- Strengthen accountability-related learning and knowledge exchange by facilitating orientation and reflection workshops on the consortium accountability framework and capturing evidence, good practices, challenges, and lessons emerging from implementation.
- Support the implementation and dissemination of consortium communication and visibility guidelines through capacity-strengthening workshops, stakeholder engagement events, and production of communication and visibility materials aligned with CARE and OCHA requirements.
- Facilitate dialogue and knowledge exchange among consortium partners, government stakeholders, humanitarian actors, and relevant coordination platforms through stakeholder consultation and networking meetings at district and national levels.
- Document and package project achievements, operational learning, promising practices, and stakeholder perspectives into knowledge products suitable for internal learning, donor reporting, advocacy, and wider dissemination.
- Conduct a comparative review of due diligence and partnership assurance approaches used by key humanitarian financing mechanisms and donors and develop a policy brief to support discussions on DDA Passporting and harmonization of due diligence processes.
- Contribute to the dissemination and uptake of anticipatory action learning through workshops, policy dialogue, communication products, and engagement with relevant humanitarian coordination and learning platforms.

- 4. Scope of the Work:** The consultant/firm will provide technical, facilitation, documentation, and logistical support across four interrelated workstreams throughout the project period.

- 4.1. Accountability Learning, Reflection and Outcome Harvesting Support:** The consultant/firm will support the consortium in capturing, documenting, and disseminating learning related to accountability and community engagement practices implemented under the project.

Key Responsibilities

- Support the planning, facilitation, and documentation of accountability-related workshops and learning events.
- Design and facilitate a consortium-wide orientation workshop on the Accountability Framework and associated accountability commitments.
- Design and facilitate a lesson-learning workshop to reflect on implementation experiences, challenges, achievements, and good practices.

- Design and facilitate a peer review and outcome harvesting workshop to identify and document significant changes, outcomes, and lessons emerging from the project.
- Prepare workshop reports, presentations, and action trackers for all learning and reflection events.
- Document key accountability-related learnings and promising practices for wider dissemination through the consortium and relevant coordination platforms.

4.2. **Communication, Visibility and Learning Dissemination Support:** The consultant/firm will support the implementation of consortium-wide communication and visibility activities to promote awareness, learning, and visibility of project achievements.

Key Responsibilities

- Support the dissemination and roll-out of the consortium Communication and Visibility Guideline.
- Organize and facilitate a communication and visibility orientation workshop for programme and communication focal points from consortium partners.
- Support the design and organization of a project learning and dissemination event to showcase key achievements, lessons learned, and innovative practices from the project.
- Develop visibility and communication materials in line with CARE, OCHA, and consortium requirements, including:
 - Banners (medium: cloth) – 4 Stand banners (8ft X 4 ft), 6 X Banners (5ft X 2ft)
 - Event backdrops (medium: cloth): (8ft X4ft), (Keeping space for pasting date and location for reusing backdrops multiple times, and redeveloping when current one becomes damaged/unusable)
 - Information materials and visual products (printing materials): 2 pagers, like leaflet/brochure, or a round shaped 3 layered paper made product which can be stuck to desks for staff learning.
 - Gift item: Totebag (Fabric – Canvas /Jute Fabric (180 to 200 GSM)
 - Dimensions – H-14 inch and W-18 inch, Handle 30 inch
 - Zipper – Optional (Nylon zipper)
 - Branding – 4/6 color DTF
 - Borosilicate glass bottle (500ml/700ml), paper pen (Type: Eco-friendly paper pen with cap
 - Body: Recycled paper, brown or white
 - Logo: No logo
 - Print: Can be hand painted in different colors
-), pen holder, notebook (Size: 8.5"x5.5", Inner Paper-white offset, 100GSM, Pages: 90 Pages/45 leaves (38 inners, 2 covers and 5 dividers-120GSM) with Cover: 300 GSM Swedish board cover and 6 Color (dividers) with 4 color printing (As per sample). Support preparation of communication content highlighting project achievements, learning, and stakeholder engagement processes.
 - Printing of project brief (1 pager, 100 copies)
 - Two Case Studies printing (4 pager both 2 pages, 100 copies)
- Ensure all communication products comply with approved branding and visibility requirements of all stakeholders.

4.3. **Stakeholder Engagement and Knowledge Sharing:** The consultant/firm will support dialogue, coordination, and knowledge exchange among key stakeholders involved in anticipatory action and humanitarian preparedness.

Key Responsibilities

- Organize and facilitate stakeholder consultation and knowledge-sharing meetings in Cox's Bazar.

- Support approximately four to five stakeholder meetings involving government representatives, humanitarian actors, consortium partners, private sector actors, and relevant technical working groups.
- Prepare meeting agendas, facilitation plans, documentation, and summary reports.
- Capture key recommendations, action points, and strategic insights emerging from stakeholder discussions.
- Support dissemination of learning and project experiences through different platforms i.e. social networks and networks (i.e. ISCG, RCP, Humanitarian Team etc.).

4.4. **DDA Passporting and Policy Documentation Support:** The consultant/firm will support knowledge generation and policy dialogue related to Due Diligence Assessment (DDA) Passporting and harmonization of partnership assurance mechanisms.

Key Responsibilities

- Conduct a review of existing due diligence and partnership assurance approaches used by selected humanitarian donors, pooled funds, and financing mechanisms.
- Analyze similarities, differences, opportunities, and challenges associated with existing approaches.
- Consult relevant stakeholders from the humanitarian and development sectors as required.
- Develop a policy brief outlining key findings and recommendations to support ongoing discussions on DDA Passporting and harmonized due diligence approaches.
- Present findings and recommendations during a consultation or validation session with consortium partners and relevant stakeholders.
- Have one or multiple roundtables with the presence of leading mainstream media to mass disseminate the findings and objectives of this project, and to also validate the policy recommendations in the public space

Summary Table of Key Deliverables

Deliverable	Quantity / Specification
Inception Report and Workplan	1
Accountability Framework Orientation Workshop	1 workshop (1.5 days) at Cox's Bazar including agenda, facilitation, workshop report, and action points. The consultant/firm will bear the costs of venue and food (2 lunches and 3 snacks) for around 30 people, and specifically the Dhaka – Cox's Bazar–Dhaka flight ticket and accommodation support for around 3 persons in Cox's Bazar in a 3-star hotel.
Accountability Learning and Reflection Workshop	1 workshop (2 days) in Cox's Bazar, including facilitation, documentation, and a lesson-learned report. The consultant/firm will bear the costs of venue and food (2 lunches and 4 snacks) for around 30 people, and specifically the Dhaka –Cox's Bazar–Dhaka flight ticket and accommodation support for around 3 persons in Cox's Bazar in a 3-star hotel.
Outcome Harvesting / Peer Review Workshop	1 workshop (1 day) including facilitation, outcome mapping, workshop report, and recommendations. The consultant/firm will bear the costs of venue and food (1 lunch and 2 snacks) for around 30 people.
Communication and Visibility Orientation Workshop	1 workshop for programme and communication focal points, including training materials(pen, notepad, 2 pager) and workshop report. This will be a 1-day workshop with around 25 participants, preferably at Cox's Bazar. The consultant/firm will bear the costs of venue and food (1 lunch and 2 snacks).

Project Learning and Dissemination Event	1 dissemination workshop with 50 participants showcasing project achievements, lessons, and good practices. This will be day-long event where the consultant/firm will provide morning snack, afternoon snack and lunch.
Stakeholder Consultation Meetings	4–5 meetings in Cox’s Bazar (10–15 participants per meeting) including agenda, facilitation, documentation, and meeting reports. All the meetings will be around 2-3 hours long. The consultant/firm will provide 1 snack for the meeting participants. Note that, the venue will be arranged separately by either CARE Bangladesh or Start Fund Bangladesh.
Communication and Visibility Materials Package	Support the production support for banners, festoons, standees, event backdrops, and other agreed visibility materials. The specification are given earlier. Note that, the design of these outputs will be led by Start Fund Bangladesh. Also, for some materials, SFB will provide the samples.
DDA Passporting Policy Brief	1 policy brief with findings and recommendations based on the comparative review of due diligence approaches used by OCHA, CARE, Start Bangladesh Hub, and other relevant donors/funding mechanisms
Final Assignment Completion Report	1 consolidated report summarizing activities completed, key findings, lessons, and recommendations

5. Methodology: The consultant/firm will adopt a participatory, collaborative, and facilitative approach to ensure meaningful engagement of consortium partners, Start Bangladesh Hub members, government stakeholders, and other relevant actors throughout the assignment. Key methodological approaches will include:

- **Workshop and event facilitation** for accountability, learning, communication, and stakeholder engagement activities.
- **Stakeholder consultations and coordination** with consortium partners, government representatives, humanitarian actors, and relevant technical platforms.
- **Documentation and knowledge capture** of lessons learned, good practices, workshop outcomes, and stakeholder perspectives.
- **Communication and visibility support**, including development of event materials, learning products, and dissemination materials in line with CARE and OCHA requirements.
- **Desk review and policy analysis** to assess and compare due diligence approaches used by humanitarian donors and financing mechanisms and inform the DDA Passporting policy brief.

6. Duration: the total duration of this assignment will be over the project duration, preferably 7 months, 30 April, 2027

7. Roles and Responsibilities

- **CARE Bangladesh:** Overall coordination, technical oversight, approvals
- **Start Bangladesh:** Provide technical support on beneficiary database harmonization, MAAP tool implementation, communication and visibility approaches, and ensure alignment using shared tools and systems across consortium partners
- **Consortium partners:** Provide data, facilitate field access, and contribute to learning, AAP, and communication processes
- **Consultant/firm:** Lead the design, implementation, and delivery of all agreed outputs, ensuring quality, timeliness, and alignment with consortium and donor requirements.

- 8. Requirements:** The consultant/firm should have demonstrated experience in facilitating workshops, stakeholder engagement, knowledge management, communication, and documentation within humanitarian or development programmes.

Required Qualifications

- Minimum 5 years of experience in workshop facilitation, documentation, communication, learning, or policy research.
- Experience working with humanitarian, disaster risk reduction, resilience, climate adaptation, or anticipatory action programmes.
- Proven experience in organizing and facilitating multi-stakeholder workshops, consultations, and learning events.
- Experience producing knowledge products such as workshop reports, learning briefs, policy briefs, case studies, and communication materials.
- Strong report writing, facilitation, and analytical skills.
- Familiarity with Accountability to Affected People (AAP), localization, and humanitarian coordination mechanisms is desirable.
- Previous experience working with NGOs, INGOs, consortium projects, UN agencies, or donor-funded programmes will be considered an advantage.

Team Composition (for Firms): At a minimum, the proposed team should include:

- A Team Leader / Learning and Documentation Specialist with relevant experience in facilitation, documentation, and policy analysis.
- A Communication and Visibility Specialist with experience in developing communication materials and supporting learning dissemination activities.

This streamlined version better reflects the actual scope of arranging workshops, stakeholder meetings, communication support, documentation, and development of the DDA Passporting policy brief.

9. Estimated Level of Effort (Consultant Days)

Deliverable	Key Activities
Inception Report and Workplan	Inception meeting, consultation with CARE/SBH, workplan preparation and inception report development
Accountability Framework Orientation Workshop	Workshop design, agenda preparation, facilitation, documentation, and reporting
Accountability Learning and Reflection Workshop	Workshop design, facilitation, lesson capture, reporting, and action tracking
Outcome Harvesting / Peer Review Workshop	Facilitation, outcome mapping, validation of outcomes, workshop report, and recommendations
Communication and Visibility Orientation Workshop	Preparation of training materials, facilitation, documentation, and workshop reporting
Project Learning and Dissemination Event	Event planning, facilitation, knowledge-sharing support, documentation, and reporting
Stakeholder Consultation Meetings	Preparation, facilitation, documentation, and reporting for 4–5 stakeholder meetings

Communication and Visibility Materials Package	Design, coordination, review, and production support for visibility materials
DDA Passporting Policy Brief	Literature review, stakeholder consultations, comparative analysis, drafting, validation, and finalization of policy brief
Final Assignment Completion Report	Consolidation of outputs, lessons learned, final reporting, and presentation of findings
Total Estimated Days	

10. Evaluation Criteria:

Proposals will be evaluated based on the following criteria, with a total score of 100 marks:

SL.	Code	Criteria	Score (%)																		
		TECHNICAL SCORE	80%																		
1	A	Overall Proposal Suitability	40%																		
	A.1	Understanding of the assignment and proposed methodology and approach and timeline	40%																		
2	B	Previous Relevant Work Experience	20%																		
	B.1	Proof of Work Order/completion certificate (Minimum 3 experience will get Score 3). 5 or above will get Score 5) <table><tr><td>Score</td><td>Marking Status</td><td>Work order/PO Copy/ Agreement/Work completion Certificate</td></tr><tr><td>1</td><td>Non-complying</td><td>No submission</td></tr><tr><td>2</td><td>Below Acceptable</td><td>1-2</td></tr><tr><td>3</td><td>Acceptable</td><td>3</td></tr><tr><td>4</td><td>Good</td><td>4</td></tr><tr><td>5</td><td>Excellent</td><td>5 and above</td></tr></table>	Score	Marking Status	Work order/PO Copy/ Agreement/Work completion Certificate	1	Non-complying	No submission	2	Below Acceptable	1-2	3	Acceptable	3	4	Good	4	5	Excellent	5 and above	20%
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1	Non-complying	No submission																			
2	Below Acceptable	1-2																			
3	Acceptable	3																			
4	Good	4																			
5	Excellent	5 and above																			
3	C	Technical Expertise and Qualifications	20%																		
	C.1	Experience in knowledge management and developing communication materials i.e. leaflet, posters, banners etc. Include organizational profile and team portfolio. Soft copy sample required for relevant work sample.	20%																		
FINANCIAL SCORE			20%																		
4	D	Financial Proposal: The lowest technically qualified bidder receives the full marks for financial score; subsequent bidders receive proportionate lower scores, converted to 20% of total.	20%																		
		TOTAL	100%																		

11. Deliverables and Payment Schedule

Deliverable Package	Description	Payment
Tranche 1: Inception Package	Submission and approval of Inception Report, detailed workplan, implementation schedule, workshop plan, communication and visibility approach, and methodology for DDA Passporting analysis.	30%
Tranche 2: Workshop, Stakeholder Engagement and Visibility Package	Successful completion of Accountability Framework Orientation Workshop, Accountability Learning and Reflection Workshop, Communication and Visibility Orientation Workshop, Stakeholder Consultation Meetings, and submission of related reports and communication/visibility materials package.	40%
Tranche 3: Learning, Policy and Final Reporting Package	Successful completion of Outcome Harvesting/Peer Review Workshop, Project Learning and Dissemination Event, DDA Passporting Policy Brief, Final Assignment Completion Report, and all remaining documentation and knowledge products.	30%

******Progressive payment will be made as per the ToR/Scope of Work indicated in terms & conditions.

12. Penalty Clause: (If required)

If the supplier/service provider fails to provide the agreed-upon services or fulfils any or all obligations within the timeline specified in the Contract/Purchase Order (PO), the Buyer reserves the right, without prejudice to its other remedies under the Contract, to impose penalties by deducting a percentage of the Contract Price/PO amount as outlined below:

Total Delay Penalty (% of Contract/PO Value)

- First 5 days 2%
- From 6-11 days 4%
- From 12-20 days 6%
- Above 20 days delay: the termination clause may also be applicable

Note: ******Deduction of the penalty amount will not be applicable in case if any extended completion time/period is officially agreed and accepted by CARE Bangladesh after the completion date mentioned in PO.

13. Application process:

If you are interested and feel competent in carrying out this very exciting consultancy work, please submit technical and financial proposals in two separate documents:

Technical Proposal:

1. Relevant Previous experience of the organization (Provide 03 or more summaries of the work completed relevant to this assignment)
2. Methodology with clear timeline and deliverables
3. Resume of team members/Organizational Profile with previous/ongoing client lists

Financial Proposal:

Filled up Financial Proposal that outlines the fees and associated costs including govt. circulated VAT & TAX and provide budget notes

**** Three times machine proof copy will be required. Price should be including machine proof charges. Supplier must take machine proof approval from CARE before final printing**

I4. Intellectual Property Rights

CARE Bangladesh's copyrights are reserved for every data set, report, and strategy document generated by the consultant during the consultancy period for the said purpose. The consultant may not share these documents or use the evidence without informing with CARE Bangladesh in written.