# Terms of Reference for Crowdfunding and CSO Engagement Expert

## 1. BACKGROUND

Achieving SDGs alone according to UNCTAD's World Investment Report will require US$3,9 trillion per year between 2015 and 2030 for health, education and infrastructure - leaving a US$2.5 trillion annual shortfall relative to the current and forecast commitments of US$1,4 trillion. To address the financial gap, new sources of innovative finance models are needed (private and venture capital, P2P lending) as well as impactful partnerships aimed at socially geared investment projects that can leverage private investments alongside official development assistance. Innovative finance models can accelerate SDGs, such as various forms of crowdfunding that are projected to overtake venture capitalists' investments and grow over US$100 billion by 2020 as per World Bank statistics.

Islamic Finance (IF) is one of the fastest-growing segments of the global financial industry with global assets expected to surpass US$3 trillion by 2020. The Islamic Finance, ideally, is an alternative way of financing based on ethical and socially responsible standards, which ensures fair distribution of benefits and obligations between all the parties in any financial transaction. The Islamic Financial Services Board has dedicated an entire section to the rise of fintech, its applications and the state of legislation in its 2017 Stability Report to remove entry barriers and provide more financial services and support to millions of Muslims, including CSOs and NGOs.

It is in this context that UNDP, Islamic Solidarity Fund for Development (ISFD) and Islamic Development Bank (IsDB) (Human Development Division) have formulated "NGOs Empowerment for Poverty Reduction Program" aimed at empowering CSOs and their socio-economic well-being, remote communities through job creation and refugees through education and stronger community livelihoods. UNDP, ISFD and IsDB will do mapping, screening and categorizing (according to their activities and field of work) of national CSOs in 57 Member Countries operating in humanitarian or development contexts.

Access to finance remains one of the main challenges for CSOs and NGOs. This obstacle is to a large extent associated with the lack of information on different funding mechanism, the weak quality of CSOs projects and campaigns shared with potential donors. The project aims at helping them explore alternative financing models such as crowdfunding and build their capacity to raise funds for their activities and projects.

In order to be able to support their work, a Crowdfunding Academy (CFA) will be established to bring valuable partners together to build the ecosystem. The CFA will organize a crowdfunding workshop for trainers and CSOs. Around 20 CSOs and NGOs will be identified through the competitive process to participate in the training.

To this aim, an Individual Consultant will be engaged in the period between 17 February 2021 and 30 July 2021, in order to coordinate and managing the preparation activities of Crowdfunding Academy and promote awareness of CSOs on TADAMON platform. The consultant will support the project team on engaging CSOs to CFA and provide his/her services with knowledge, share opportunities and networking for better delivery of services.

## 2. OBJECTIVE AND SCOPE

The main objective of the assignment is to coordinate the preparation activities of Crowdfunding Academy and promote awareness of CSOs on TADAMON platform. The Individual Consultant will contribute to build an ecosystem for the CSO and NGO actors in Turkey and will be responsible for the organization of Crowdfunding Webinars and Training of the Trainers Program, along with coordination of the organization of Crowdfunding Academy (CFA) Training workshop.

## 3. DUTIES & RESPONSIBILITIES OF THE INDIVIDUAL CONSULTANT (IC)

UNDP will mobilize an Individual Consultant (IC) to coordinate activities to be conducted for the establishment of the Crowdfunding Academy and to support the awareness raising activities on the TADAMON platform. This IC will work under the overall guidance of UNDP Turkey CO and TADAMON focal points. The supervisor of the Individual Consultant on UNDP side will be the ISG Portfolio Manager.

Duties and responsibilities of the Individual Consultant are as follows:

**TASK 1. Screening the Crowdfunding and CSO Ecosystem in the country**

- Coordinating the organization of at least 2 webinars to CSOs on Crowdfunding Academy program and "NGO Empowerment".
- Building an outreach network for connecting the Digital Crowdfunding Academy online with the local NGOs.
- Giving input for the preparation of a call for applicants by means of press release, website (UNDP or partners) and social media to screen and select CSOs to participate in the Crowdfunding Academy.
- Supporting the materials on the CFA to go online and to UNDP social networks in the country.

**TASK 2. Training of Trainers for Crowdfunding Academy**

- Supporting the preparation of CFA training guideline, manual, program and courses on Digital Crowdfunding Academy.
- Preparation of draft manual and guidelines to Create a Crowdfunding Training of Trainers (ToT) program for UNDP, partners and local experts working on crowdfunding.
- Supporting UNDP for developing terms of reference for the potential local experts needed for the training of CSOs.
- Contributing to the identification of at least 5 local crowdfunding experts that can deliver trainings (either those from crowdfunding platforms or already experienced in crowdfunding).
- Supporting UNDP for the identification of the list of experts (story tellers, content manager, videographers, editors, graphic designers) who can support CSOs in their campaign.
- Attending and coordinating a workshop to meet local experts with TADAMON team (from "NGO Empowerment" project) on setting up the capacity building training for CSOs.
- Coordinating and contributing the organization of one day ToT event for at least 5 local crowdfunding experts in Turkey.

**TASK 3. Training for CSOs - Crowdfunding Academy**

- Coordinating the delivery of at least 5-day capacity building trainings for 20 selected CSOs that will participate in the CFA in creating crowdfunding campaigns; that is connected with the Digital Crowdfunding Academy e-learning course.
- Giving inputs on the preparation of 12 campaigns after the implementation of CFA.
- Contributing to 8 campaigns to be launched online after finalization of the trainings.

## 4. DUTIES AND RESPONSIBILITIES OF UNDP

UNDP will provide background materials, for the IC's review, reference and use. Neither UNDP nor any of the Project partners are required to provide any physical facilities for the work of the IC. However, depending on the availability of physical facilities (e.g. working space, computer, printer, telephone lines, internet connection, etc.) and at the discretion of UNDP in consultation with relevant

stakeholders, such facilities may be provided at the disposal of the IC. UNDP and/or the relevant project partners will facilitate meetings between the IC and other stakeholders, when needed.

All documents and data provided to the consultant are confidential and cannot be used for any other purposes or shared with a third party without any written approval from UNDP.

## 5. EXPECTED OUTPUTS AND DELIVERABLES

The IC will work as Crowdfunding and CSO Engagement Expert and is expected to invest **(at maximum) 60 person/days** throughout the contract duration. The table below outlines the number of person/days that are allocated to the Individual Consultant to carry out the assignment.

The "**Crowdfunding and CSO Engagement Expert**" is expected to deliver the below outputs/deliverables to the satisfaction of UNDP:

| NO. | ACTIVITY | DELIVERABLE | ESTIMATED NUMBER OF PERSON/DAYS TO BE INVESTED | TARGET DATE* FOR SUBMISSION TO UNDP |
|---|---|---|---|---|
| **1** | TASK 1 | Preliminary Planning Report on the activities of TASK 1 *(All reports will be covering relevant annexes, like CSO Introductory webinar result reports, recommendation notes, evaluation papers, etc.)* | **10 days** | 12 March 2021 |
| **2** | TASK 2 | Adopting the additional materials to be used with Digital Crowdfunding Academy and supporting the Crowdfunding ToT Program | **7 days** | 1 April 2021 |
| **3** | TASK 2 | Report on the Identification of Local Crowdfunding Experts and mapping the local CSO/crowdfunding ecosystem *(All reports will be covering relevant annexes, like Meeting of Minutes, Mapping Exercise, recommendation notes, evaluation papers, etc.)* | **5 days** | 15 April 2021 |
| **4** | TASK 3 | Organizing the Crowdfunding Academy (CFA) for 20 CSOs and submitting Training Results Report *(All reports will be covering relevant annexes, like participants lists, recommendation notes, evaluation papers, etc.)* | **20 days** | 5 May 2021 |

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|---|---|---|---|---|
| **5** | TASK 3 | Report on providing further support to CSOs by developing at least 12 campaigns, of which at least 8 campaigns will be launched online | **18 days** | 20 July 2021 |
| **ESTIMATED MAXIMUM TOTAL** | | | **60 days** | *Dates may be changed according to actual contract start date. |

- ***Reporting Line***

The IC shall be responsible to the ISG Portfolio Manager for the completion of the tasks and duties assigned in Article 3 and 5 of this ToR. The reports shall be submitted to the ISG Portfolio Manager for approval.

- ***Reporting Language and Conditions***

The reporting language shall be in Turkish and/or English (as to be defined by UNDP). All information shall be provided in electronic versions in word and PDF format. The IC shall be solely liable for the accuracy and reliability of the data provided, links to sources of information used.

- ***Title Rights***

The title rights, copyrights and all other rights whatsoever nature in any material produced under the provisions of this ToR will be vested exclusively in UNDP Turkey CO.

## 6. TIMING AND DURATION

The Assignment is expected to start on **17 February 2021** and be completed by **30 July 2021**. The IC is expected to invest maximum **60 person/days** to fulfill the required tasks stated in Article 3 and 5, throughout contract validity.

In order to fulfill required tasks for the development of deliverables as defined and listed in the table above, the **estimated** number of days to be invested are also provided. The number of days presented as 'estimated number of person/days to be invested' are **indicative**. The IC may invest less/more than the estimated number of days for each deliverable and finalize the respective deliverable.

The payment for each deliverable will be made on the basis of the actual number of days invested for that respective deliverable; however, the overall number of days to be invested for all deliverables cannot exceed **60 person/days** for the "Crowdfunding and CSOs Engagement Expert" **throughout the contract validity**.

## 7. PLACE OF WORK

Place of work for the Assignment is Home-based. The IC may be requested to travel to Turkey. The travel, accommodation costs (bed and breakfast) and living costs (terminal expenses, intra-city travel costs, lunch, dinner, etc.) of the missions to Ankara and other provinces of Turkey will be borne by UNDP. UNDP will arrange economy class roundtrip flight tickets through its contracted Travel Agency. In case of need of additional travels that are unforeseen in the ToR, the costs of the respective travels of the IC may either be.

- Arranged and covered by UNDP from the respective budget without making any reimbursements to the IC, through UNDP's official Travel Agency or,
- Reimbursed to the IC upon the submission of the receipts/invoices of the expenses by the IC and approval of the UNDP. The reimbursement of each cost item is subject to the following constraints/conditions provided in below table or,
- Covered by the combination of both options.

The following guidance on travel compensation is provided as per UNDP practice:

| Cost item | Constraints | Conditions of Reimbursement |
|---|---|---|
| Travel (intercity transportation) | Full-fare economy class tickets | 1- Approval by UNDP of the cost items before the initiation of travel.<br>2- Submission of the invoices/receipts, etc. by the IC with the UNDP's F-10 Form.<br>3- Acceptance and Approval by UNDP of the invoices and F-10 Form. |
| Accommodation | Up to 50% of the effective DSA rate of UNDP for the respective location | |
| Breakfast | Up to 6% of the effective DSA rate of UNDP for the respective location | |
| Lunch | Up to 12% of the effective DSA rate of UNDP for the respective location | |
| Dinner | Up to 12% of the effective DSA rate of UNDP for the respective location | |
| Other Expenses (intra city transportations, transfer cost from /to terminals, etc.) | Up to 20% of effective DSA rate of UNDP for the respective location | |

As per UNDSS rules, the IC is responsible for completing necessary online security trainings and submitting certificates and travel clearance prior to assignment-related travels.

## 8. REQUIRED QUALIFICATIONS

The qualification requirements and/or experience for **"Crowdfunding and CSO Engagement Expert"** are presented below:

| | Minimum Qualification Requirements | Assets |
|---|---|---|
| ***General Qualifications*** | • Bachelor's degree in administrative & social sciences, business management, economics, engineering or any other relevant field<br>• Excellent language skills in Turkish and English | • Excellent reporting and editing skills<br>• Master's degree in administrative & social sciences, international development, business management, economics or any other relevant field |
| ***General Professional Experience*** | • At least 6 (six) years of general professional experience<br>• At least 2 (two) years of working experience in/with Turkish ecosystem players, i.e. NGOs, CSOs, unions and relevant government units, ministries, etc. | |

| | Minimum Qualification Requirements | Assets |
|---|---|---|
| ***Specific Professional Experience*** | • At least 5 (five) years of experience in Crowdfunding and/or CSO engagement<br>• At least 2 (two) years of experience in designing and delivering capacity building programs | • Strong network of national/international CSOs & capacity building organizations proven by membership or involvement to the CSOs in Turkey |
| Notes:<br>• Internships (paid/unpaid) are not considered professional experience.<br>• Obligatory military service is not considered professional experience.<br>• Professional experience gained in an international setting is considered international experience.<br>• Experience gained prior to completion of undergraduate studies is not considered professional experience. | | |

UNDP is committed to achieving workforce diversity in terms of gender, race, ethnicity, indigenous identity, disability and culture. Individuals from all genders, minority groups, indigenous groups and persons with disabilities are equally encouraged to apply. All applications will be treated with utmost confidentiality.

## 9. PAYMENTS

Payments will be made within 30 days upon approval of deliverables by UNDP, along with the Certification of Payment Form (COP) on the basis of the actual number of person/days invested by the IC for development of that respective deliverable and pertaining payment documents signed by the IC and approved by the responsible Portfolio Manager. While the IC may invest less or more than estimated number of person/days for each deliverable different than the estimated person/days stipulated in the table in Article 5, the total amount of payment to be affected to the IC within the scope of this Assignment cannot exceed equivalent of 60 person/days throughout the contract validity.

If any of the deliverables stipulated in Articles 3 and 5 of this Terms of Reference are not produced and delivered by the IC in due time and to the satisfaction of UNDP, no payment will be made even if the IC has invested person/days to produce and deliver such deliverables.

The IC shall be paid in USD if he/she resides in a country different than Turkey. If he/she resides in Turkey, the payment shall be realized in TRY through conversion of the USD amount by the official UN Operational Rate of Exchange applicable on the date of money transfer.

The daily fee to be paid to the IC is fixed regardless of changes in the cost components. The daily fee amount should be indicated in gross terms and hence should be inclusive of costs related to tax, social security premium, pension, visa (if needed) etc. UNDP will not make any further clarification on costs related to tax, social security premium, pension, visa etc. It is the applicants' responsibility to make necessary inquiries on these matters.

Tax Obligations: The IC is solely responsible for all taxation or other assessments on any income derived from UNDP. UNDP will not make any withholding from payments for the purposes of income tax. UNDP is exempt from any liabilities regarding taxation and will not reimburse any such taxation to the IC.