TERMS OF REFERENCE FOR IC CONTRACT

Consultancy: Operationalize and Implement the Financing Individual Giving Fundraising
Modalities for the Programme Expansion

TERMS OF REFERENCE (to be completed by Hiring Office)	
Hiring Office:	UNFPA – Latin America and the Caribbean Regional Office
Purpose of Consultancy:	The purpose of this consultancy is to operationalize and implement the innovative financing modalities identified aimed at expanding the Individual Giving Programme (IGP). The IGP is a critical component of UNFPA's resource mobilization strategy, necessitating sustained investment to ensure its growth and success. Effective management of these resources is essential to maximize the return on investment and advance the UNFPA mandate within the region. Given the context of limited internal resources available for investment, UNFPA has identified strategic financing solutions that can support the IGP's expansion. This consultancy will therefore focus on concretely operationalizing and implementing these modalities.
Background and scope of work *(Description of services, activities, or outputs)*	UNFPA has established a highly successful Global Individual Giving Programme (IGP), demonstrating strong performance across various regions. In October 2024, a market expansion strategy will be launched to test the IGP's potential in several high-opportunity countries, including Mexico and Brazil. These markets have been identified as key to scaling the program's impact in the Latin America and Caribbean (LAC) region. To sustain the momentum of IGP growth globally and in markets and to facilitate further expansion into other LAC countries and other regions, UNFPA identified 3 innovative financing modalities to fund Individual Giving: Performance- based Growth Modality: Individual Giving (IG)-generated revenue is directed towards increasing core funding to support programme priorities. A smaller proportion of IG revenue is re-invested to expand the IG programme, based on agreed-upon performance indicators. Expansion based on Internal Partnerships: Organizations use their internal funds mechanisms to launch fundraising appeals and invest in IG programmes to enhance their capacity for generating future income. Expansion through External Partnerships: A Financial institution and/or investors lend money to an Organization to run IGP and the Organization repays it back with interests and/or equities. The consultant will be responsible for the following tasks: **Operationalize the 3 Modalities**: ● Draft detailed Standard Operating Procedures (SOPs) for each modality, outlining the processes for allocating and reinvesting IG-generated revenue. ● Map out the end-to-end flow of funds under each modality, including steps for revenue allocation, reinvestment, and reporting. ● Collaborate with internal stakeholders (e.g., Finance, Legal, and Programmes departments) to define clear guidelines, responsibilities, and workflows. ● Create a compliance framework to ensure that all financial flows meet UNFPA's organizational policies and donor requirements. **Develop Financial Projections and Embed Them in IG Projections**: ● Apply financial analysis for each modality, including expected returns, reinvestment rates, and operational costs in order to prepare projections based on real case implementation.

	- Develop multiple financial scenarios based on market conditions, donor behavior, KPI etc... - Integrate the financial projections into the overarching IG revenue model to assess how each modality contributes to the overall growth strategy. - Define KPIs to measure financial performance against projections. **Engage and Secure Partnerships**: - Develop tailored pitch materials and financial models to present to potential partners, clearly illustrating the benefits and ROI of collaborating under each modality. - Conduct outreach campaigns, set up meetings, and negotiate terms with financial institutions, investors, and internal stakeholders. - Secure agreements and establish partnership frameworks that define roles, responsibilities, and operational workflows.
Duration and working schedule:	**Consultancy Start Date: 27 January 2025.** **Final Comprehensive Report Submission: 15 July 2025**
Place where services are to be delivered:	The consultant works remotely and must have his/her operational capabilities (office, information technology, and communications).
Delivery dates and how work will be delivered (e.g. electronic, hard copy etc.):	**Deliverables/Products:** 1. Standard Operating Procedures Document Description: A finalized set of SOPs for each financing modality, outlining clear fund allocation processes, end-to-end flow of funds under each modality, steps for revenue tracking and reporting etc… Timeline: Completed by 15 March 2025. 2. Financial Projections Report with Scenarios and KPIs Description: A report providing detailed financial projections for the three modalities, including expected returns, operational costs, and reinvestment rates. The deliverable will include multiple financial scenarios based on market conditions, donor behavior, and performance indicators, as well as defined KPIs for monitoring and evaluation. Timeline: Completed by 15 April 2025. 3. Implementation Road Map Description: A detailed plan outlining the steps to implement the three financing modalities within UNFPA. This roadmap will include a timeline with key milestones, gap analysis, and enabling factors for scaling the modalities, reach out to partners and deal closed. Timeline: Completed by 15 July 2025.
Monitoring and progress control, including reporting requirements, periodicity format and deadline.	Monitoring and progress carried out and documented by e-mail. Coordination and follow-up done through virtual meetings.
Supervisory arrangements:	Under the overall supervision of the Resource Mobilization and Partnerships Adviser, and in coordination with the IGP team.
Expected travel:	N/A
Required expertise, qualifications and competencies,	- At least 7 years of experience in the field of investment modalities, and/or innovative finance, economics, individual giving programme development.

including language requirements:	English and Spanish are required. Experience working with international organizations is desirable. ● Demonstrated ability to analyze complex data and convert them into investment proposals. ● Excellent writing and editing skills ● Ability to work independently and as part of the team ● Ability to work quickly and meet tight deadlines ● Knowledge of the economic context in Latin America and the Caribbean, including IFIs and Development Banks.