TERMS OF REFERENCE

Consultant Mentor – Research, Policy and Budget Analysis Capacity Development

Local Empowerment and Development – Civil Society (CSO LEADs) Project

1. Background and Introduction

People in Need (PIN), established in 1992, is one of Central Europe's leading non-profit organisations working in humanitarian aid, development cooperation, human rights, education and social inclusion. PIN has operated in Zambia since 2017, focusing on emergency response and recovery, climate resilience, and civil society and inclusive governance.

The ***Jesuit Centre for Theological Reflection (JCTR),*** founded in 1988, promotes social justice and equality in Zambia through research, policy engagement, civic education and advocacy grounded in Christian values.

PIN and JCTR are jointly implementing the European Commission-funded Local Empowerment and Development – Civil Society (CSO LEADs) Project. The project seeks to strengthen the resilience, effectiveness and sustainability of Civil Society Organisations (CSOs) and CSO Networks across Zambia.

2. Assignment Details

Item	Details
Post title	Consultant Mentor – Research, Policy and Budget Analysis Capacity Development
Project	Local Empowerment and Development – Civil Society (CSO LEADs)
Purpose	To support CSOs and CSO Networks to generate, analyse and use credible evidence for advocacy, policy engagement and social accountability.
Target group	Up to 10 CSOs and CSO Networks
Assignment period	Upon contract signing to 31 March 2027.
Key reporting dates	Interim Report: 31 December 2026; Final Report: 31 March 2027.
Duty station	Zambia, with field engagement and virtual support as agreed with PIN and JCTR.

3. Purpose and Objectives of the Assignment

The purpose of the assignment is to strengthen the research, policy analysis, public budget analysis and advocacy capacity-development support under CSO LEADs. The consultant will work collaboratively with CSOs/CSO Networks to:

- Strengthen practical capacity to undertake applied research and generate evidence relevant to advocacy and policy engagement;
- Enhance understanding and application of policy, legislative and institutional analysis;
- Build capacity to analyse public budgets, track allocations and monitor expenditure;
- Support CSOs to translate evidence into policy briefs, analytical reports and position papers developed jointly with them;
- Facilitate peer learning and study visits that expose participating organisations to practical examples and concrete project activities; and
- Promote accessible, sustainable learning resources and document progress, results, challenges and lessons.

4. Scope of Work and Key Responsibilities

The consultant with PIN and JCTR will have but not limited to the following responsibilities:

1. Develop a workplan with PIN and JCTR.
2. Consult CSOs/CSO Networks to validate priority themes and mentorship needs for policy analysis, public budget analysis and peer learning.
3. Design and facilitate study visits and peer-learning opportunities around themes identified by CSOs/CSO Networks. Visits/exchanges should enable participating organisations to observe concrete project activities, approaches or practices and reflect on their applicability.
4. Work jointly with CSOs to undertake policy analysis and public budget analysis and produce relevant outputs, including policy briefs, analytical reports and position papers. Outputs should be evidence-based, clear, audience-appropriate and linked to advocacy or accountability priorities.
5. Develop a practical, user-friendly resource pack for advocacy capacity building. The pack should consolidate relevant guidance, tools, templates and learning materials and be prepared in a format suitable for uploading to and accessing through the Civil Society Now platform.
6. Provide targeted technical support, mentorship or follow-up to ensure that learning and analytical products are applied and completed, within the agreed level of effort.
7. Maintain records of activities, participation, outputs, feedback and emerging outcomes, and coordinate with PIN/JCTR and other project consultants where joint reporting inputs are required.
8. Prepare the interim and final reports within the deadlines specified in these Terms of Reference.

5. Deliverables and Submission Schedule

All deliverables shall be submitted electronically to the PIN Project Manager and JCTR PDE Manager for review and approval. The consultant shall incorporate consolidated feedback within agreed timelines.

Deliverable	Description / minimum content	Due date / timing
1. Study visits and peer-learning opportunities	A brief plan for each visit/exchange (theme, objectives, participating organisations, itinerary/activities and learning questions); facilitation of agreed visits/exchanges; and a report documenting participation, activities, key learning and follow-up actions.	As agreed in the workplan; within assignment period
2. Policy and public budget analysis outputs	Policy briefs, analytical reports and/or position papers developed jointly with CSOs/CSO Networks. Each output should identify the issue, evidence and analysis, key findings and recommendations, and intended advocacy/policy use.	Progressively, according to agreed priorities
3. Advocacy capacity-building resource pack	A consolidated, practical resource pack comprising relevant guidance, tools, templates and learning materials for CSO advocacy capacity building; edited and formatted for upload to the Civil Society Now platform, with an inventory/index and upload guidance as necessary.	Draft for PIN/JCTR review; final before assignment completion
4. Interim Report	Summary of activities implemented, deliverables completed and progress against workplan, emerging outputs/outcomes, participation, challenges, lessons and outstanding actions/risks.	By 31 December 2026
5. Final Report	Consolidated report summarising activities implemented; outputs delivered; outcomes achieved	By 31 March 2027

	or emerging; challenges encountered; lessons learned; and practical recommendations. Include a deliverables tracker and relevant annexes/evidence.	

6. Approach and Methodology

The consultant is expected to use a participatory, inclusive and demand-driven approach. Work should be coordinated closely with PIN and JCTR, respond to CSO/CSO Network priorities, and emphasise practical application of learning. The consultant should:

- Use accessible and appropriate methods for in-person, field-based and virtual engagement;
- Ensure meaningful participation of relevant CSOs/CSO Networks and document feedback;
- Apply sound analytical methods and quality assurance to all research, policy and budget products;
- Use clear, accessible language and formats suitable for CSO use and public advocacy; and
- Agree deliverable formats, review points and timelines with PIN/JCTR at inception.

7. Institutional Arrangements and Reporting

The consultant will work under the supervision of the JCTR PDE Manager. PIN and JCTR will jointly provide relevant project information, access to CSO profiles, coordination and scheduling support, and consolidated feedback on deliverables. The consultant will work directly with participating CSOs and CSO Networks and coordinate with other project consultants where necessary.

At commencement, the consultant will agree with PIN and JCTR an inception/completion workplan identifying existing outputs, outstanding activities, priority CSOs/themes, deliverable milestones and review arrangements. The consultant shall keep PIN/JCTR informed of progress and promptly flag risks or delays.

8. Required Qualifications and Experience

- A bachelor's degree in Development Studies, Economics, Public Policy, Social Sciences or a related field; a postgraduate qualification is an advantage;
- At least five years' demonstrated experience in research, policy analysis and/or public budget analysis;
- Experience in capacity development, training, mentorship or coaching of CSOs;
- Strong analytical, facilitation, writing and presentation skills;
- Experience working with CSOs and/or CSO Networks;
- Proficiency in English; knowledge of local languages is an asset; and
- Experience using digital tools for learning, collaboration and preparation of accessible resource materials.

11. Application Process

Interested consultants should submit applications by email to jctr.careers@gmail.com, copying procurement.zambia@peopleinneed.net.

Email subject: "CSO LEADs Consultant – Research, Policy and Budget Analysis Capacity Development"

Applications should include:

- Cover letter (maximum one page);
- CV (maximum three pages);
- Proposed approach and methodology, including an indicative workplan/timeline for completing the deliverables;
- Copies of academic and professional certificates;
- At least two reference letters indicating the scope and duration of previous assignments;
- List of relevant assignments completed in the last five years;
- Supporting documentation (contracts, service orders or completion certificates); and
- Financial proposal indicating the daily rate inclusive of all costs and the estimated total cost for the proposed level of effort.

Deadline for submission:

Friday, 20th November 2026 - 5PM CAT.