

## TERMS OF REFERENCE

### Foundation Fundraising Consultant

#### About CPI

**Community Partners International (CPI)** believes in a balanced distribution of power in aid systems, centered on those closest to the challenges. We nurture mesh network health systems — a locally led, decentralized and resilient model that enables local organizations to lead, cooperate and deliver care even in the most fragile settings. We equip local organizations with tools and resources to sustain and scale health, humanitarian relief and well-being services. We build trust, connect peer organizations and advance practical, evidence-based policy and service delivery.

Since 1998, we've equipped more than 140 local organizations to lead rescue, recovery and resilience in conflict- and poverty-affected communities. By 2035, we aim to weave 300 local organizations into coordinated networks serving more than 10 million people from Myanmar.

Learn more at <https://cpintl.org/>

#### About This Assignment

CPI recognizes that accessing foundation funding requires a clear articulation of its value proposition, alignment with foundation priorities, strategic relationship development, and systematic engagement. Therefore, CPI intends to engage a qualified consultant to assess its readiness, identify suitable foundations, and develop a practical strategy to engage and secure foundation support.

#### Purpose of the Assignment

The purpose of this consulting assignment is to support CPI to identify, prioritize and develop strategic approaches to foundations as potential funding partners. The exact scope of the contract will be negotiated with the appointed consultant.

The consultant will work closely with key staff and leadership to:

1. Review CPI's strategic positioning and funding priorities
2. Identify foundations aligned with CPI's mission and programs and develop tailored engagement strategies
3. Strengthen internal readiness to pursue foundation funding
  - Review CPI's current foundation engagement approach
  - Provide high-level strategic advisory support to the Foundation Working Group (FWG)
  - Support development of strengthened coordination, systems, and prioritization
  - Advise on positioning, sequencing, and governance for foundation engagement

- Support CPI in organizing its foundation strategy into a clear, actionable framework, including staffing, structure, roles and responsibilities

## Objectives

- Assess CPI's strategic positioning, strengths, and funding needs in relation to foundation funding building on past theory of change work
- Identify and prioritize relevant foundations, including existing funders, with strong alignment to CPI's mission and programs
- Develop tailored engagement strategies and approaches for priority foundations
- Provide actionable recommendations and tools to support ongoing foundation engagement

## Scope of Work

The consultant will undertake the following tasks:

### 1. Internal Assessment and Stakeholder Consultations

Review key organizational documents, including:

- Strategic plan
- Theory of Change
- Program descriptions
- Annual reports
- Existing donor lists and funding history
- Communication and fundraising materials

Conduct interviews with key staff and leadership, including:

- CEO and senior staff members
- Program staff and key selected other team members
- Development and Communications Staff
- Selected board members
- Selected donors

The interviews will aim to clarify:

- Priority programs and funding needs
- Unique value proposition and areas of comparative advantage
- Existing relationships with foundations and networks
- Leadership and staff networks that may facilitate introductions
- Organizational readiness and capacity for foundation engagement, and current roles and structure in place to do so

### 2. Foundation Landscape Mapping and Analysis

Review a longlist of relevant foundations at national, regional, and international levels. To the extent possible, this should include a suggestion of areas of focus regionally, between Asian philanthropies, European or American. Assess alignment between foundation priorities and NGO programs.

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Develop a prioritized shortlist of high-potential foundations based on:

- Strategic alignment
- Funding size and relevance
- Geographic and thematic focus
- Accessibility and likelihood of engagement
- Existing or potential relationship pathways

### 3. Engagement Strategy Development

For priority foundations, develop tailored approaches including:

- Recommended engagement pathways (e.g., warm introductions, open calls, partnerships)
- Suggested positioning and messaging
- Recommended entry points (concept notes, meetings, events, proposals)
- Relationship-building strategies and timelines
- Sequencing and prioritization of engagement efforts

### 4. Recommendations and Capacity Strengthening

Provide practical recommendations including:

- Foundation engagement strategy and roadmap (12–24 months)
- Priority actions and sequencing
- Roles and responsibilities within CPI
- Recommended internal improvements to strengthen foundation readiness, such as formal structures, accountability and internal communications:
  - Tools and templates (e.g., foundation tracking matrix, outreach approach framework)
  - Recommendations for organization staffing and roles to increase foundation engagement

## Deliverables

The consultant will produce the following deliverables:

### Deliverable 1: Inception Note (within 2 weeks of contract start)

Including:

- Understanding of assignment
- Proposed methodology
- Workplan and timeline
- Interview plan

This should be prepared in consultation with the Foundation Working Group to ensure the project's scope matches the appointed consultant's pre-existing skills and networks.

### Deliverable 2: Foundation Landscape Mapping Report

Including:

- Review the existing list of potential foundations, and add potential additions

- Shortlist of priority foundations (typically 15-20)
- Foundation profiles, including priorities, funding ranges, and engagement pathways, and a prioritization matrix

### **Deliverable 3: Foundation Engagement Strategy Report**

Including:

- Strategic positioning recommendations
- Tailored engagement strategies for priority foundations
- Recommended approach pathways
- 12–24 months engagement roadmap
- Practical recommendations and tools
- Recommendations to leadership to increase foundation engagement

### **Deliverable 4: Presentation to Foundation Working Group**

- Presentation of key findings, recommendations, and proposed next steps.

### **Duration and Level of Effort**

- Expected duration: [6–12 weeks]
- Estimated level of effort: [20–40 days], depending on scope

### **Reporting and Coordination**

The consultant will report to the Senior Director of Strategic Partnerships. CPI will:

- Facilitate access to relevant documents
- Coordinate interviews with key staff
- Provide feedback on draft deliverables

### **Payment Schedule (Example)**

- 20% upon approval of the inception note
- 40% upon submission of the foundation mapping report
- 30% upon submission of the final engagement strategy
- 10% upon presentation and completion of the assignment

### **Application Requirements**

Interested consultants should submit:

- Technical proposal outlining methodology and approach
- Financial proposal (daily rate and total estimated cost)
- CV(s) of consultant(s)
- Examples of similar work undertaken
- References

## Confidentiality

All information shared with the consultant will be treated as confidential and used solely for the purposes of this assignment.

## Essential Skills

### Required:

- Demonstrated experience in nonprofit fundraising, particularly in foundation fundraising.
- Proven experience in conducting donor mapping and developing effective foundation engagement strategies.
- Strong knowledge of the foundation funding landscape, particularly in areas related to health, humanitarian response, and systems change.
- Experience working with NGOs or international development organizations, including familiarity with how organizations structure and manage foundation partnerships.
- Strong analytical, research, and strategic planning skills.
- Excellent written and verbal communication skills in English.

### Desirable:

- Knowledge of foundations relevant to the NGO or humanitarian sector.
- Experience working with organizations of similar size, structure, and operational scope.
- Familiarity with philanthropic foundations across Asia, Europe, and North America