

**Title:**

**Terms of Reference (ToR) for  
Consultant: Development of  
Remote Monitoring and  
Management Guidelines and  
Standard Operating Procedures  
(SOPs) for Restricted or remote  
Contexts**

## Introduction

Remote monitoring and management (RMM) approaches enable organisations to reach populations in conflict-affected regions, whilst simultaneously providing a means to collect and analyse data, assess program implementation, ensure accountability and manage the security of staff.

Traditionally these approaches have been necessary in situations where access to project sites is limited, e.g. due to security concerns. Increasingly, remote management is a choice; programmes and projects are designed and implemented remotely from the inception phase, no longer a temporary or last resort just for fragile or conflict-affected states.

However, remote management can pose a substantial threat to programme quality and accountability, which need to be effectively managed in order to fulfil commitments to those we serve, to our supporters and our donors.

## Purpose of the ToR

The purpose of this Terms of Reference (ToR) is to outline the objectives, scope, deliverables, and qualifications required for a consultant to develop remote monitoring and management guidelines and Standard Operating Procedures (SoPs) for Tearfund's operations in restricted contexts.

## Rationale

Tearfund is keen to improve remote monitoring, management and accountability practices, in order to effectively safeguard technical quality and adequately mitigate against fraud, corruption and a lack of accountability. We are seeking to mitigate risk but also make our programming practices better. Finally, we want - and need - to meet the commitments we have made to CHS, the UK Charity Commission, and to our supporters and donors.

## Organisation Background

Tearfund is a Christian charity that partners with churches in more than 50 of the world's poorest countries. We tackle poverty through sustainable development, responding to disasters, and challenging injustice. We believe an end to extreme poverty is possible and seek to bring lasting change and transformation to these

countries. We mainly work with local partners to implement our projects and rarely adopt a direct implementation approach.

Through our commitment to working in conflict affected states (such as Yemen and Afghanistan) as well as in countries where our access is limited or absent to address root causes of violence and/or respond to crises, we are increasingly required to employ RMM approaches. We also actively chose to do this in our Model One countries, where we ‘influence change’ by catalysing, envisioning or strengthening formal networks and movements (e.g. of churches, theological institutions, individuals, and other civil society actors) who are driving wider church participation in government policy, economic systems, legal systems, and social-cultural practices.

## Consultancy Background

Tearfund Eurasia and North Africa Regional Office is seeking a qualified consultant to develop a comprehensive Remote Monitoring and Management Guidelines and Standard Operating Procedures (SOPs). The consultancy work will draw on specific case study countries where Tearfund operates, including Afghanistan and Yemen where we operate remotely, but in different ways and for different reasons. Further case study countries will be selected from other Tearfund regions to ensure effective and contextually relevant remote monitoring practices.

## Objectives

The primary objectives of this consultancy are to:

- Develop clear and practical Remote Monitoring and Management Guidelines that outline the principles, methodologies, tools, and best practices for remote monitoring in conflict affected environments such as Afghanistan and Yemen, and for those contexts where Tearfund chooses to ‘influence change’ remotely. The guidelines will take into consideration:
  - Monitoring of activities
  - Vetting of vendors and suppliers
  - CHS delivery
  - Programmatic best practice verifications
  - Compliance
  - Finance
  - Security
- Create detailed Standard Operating Procedures (SOPs) that provide systematic instructions for implementing remote monitoring processes in projects operating in remote contexts, such as Afghanistan and Yemen.
- Ensure that the developed guidelines and SOPs align with Tearfund's mission, values, policies and project management standards.
- Ensure that the developed guidelines and SoPs are user-friendly, context-specific, aligned with industry standards, and relevant to the organisation's needs.

- Facilitate capacity building by providing clear guidance and training materials for staff and partners to implement remote monitoring effectively.
- Strengthen programme oversight and accountability to minimise legal and financial risks associated with contexts. This might include external government regulations and sanctions.

## Scope of Work

The consultant's scope of work will include the following activities:

- Review external current best practice and literature within the humanitarian sector on remote monitoring and management to understand the current landscape.
- Review existing remote monitoring guidance and practices within Tearfund's organisational framework, with a focus on Afghanistan and Yemen projects (noting that other countries might also be included as case studies), as well as policies around data protection, privacy, safeguarding.
- Work with relevant internal stakeholders and cross groups to ensure compliance, finance, security and programmatic considerations and best practice are incorporated.
- Engage with Tearfund and partner staff to gather insights, requirements, and feedback on remote monitoring needs, as well as to identify specific remote monitoring requirements and challenges in remote operating contexts, with a focus on selected case studies countries.
- Draft Remote Monitoring Guidelines that define the purpose, scope, principles, key components, and steps of remote monitoring for effective decision-making. The guideline should also encompass data collection, analysis, reporting, and adaptation strategies for these complex contexts. The guideline content should focus on a range of aspects, including monitoring of activities, vetting of vendors and suppliers, Core Humanitarian Standard (CHS) delivery, programmatic best practice verifications, compliance, finance, and security risks.
- Develop detailed SOPs that outline detailed instructions, tools, and templates for each stage of the remote monitoring process, including data collection, analysis, reporting, and quality assurance. The SOPs should also provide practical guidance for remote monitoring setup, data validation, technology selection, and ethical considerations relevant to case study countries.
- Incorporate feedback from Tearfund as well as partners' staff and ensure the guidelines and SoPs align with organisational policies, procedures, and Tearfund's data protection principles.
- Collaborate closely with Tearfund staff and key stakeholders to ensure the applicability and cultural sensitivity of the guidelines and SOPs.

- Provide targeted capacity-building support to selected Tearfund staff for effective implementation and use of the developed guidelines and SOPs.

## Deliverables

The consultant is expected to deliver the following:

- **Inception Report:** This report will outline the consultant's understanding of the objectives, scope, methodology, and timeline of the assignment after consulting with Tearfund Regional DME Advisor. It will also include a detailed work plan and a proposed structure for the remote monitoring guidelines and SOPs.
- **Draft Remote Monitoring Guidelines and Standard Operating Procedures:** Those documents will present the guidelines and SoPs developed by the consultant. They should include clear, practical, and concise instructions, templates, and examples to facilitate implementation.
- **Consulting with Internal stakeholders to produce a final Remote Monitoring Guidelines and Standard Operating Procedures:** Taking into account feedback and recommendations from the Tearfund and partners staff, as well as learning from external best practices. The consultant should deliver the finalised version of the remote monitoring guidelines and SoPs in an editable and printable format.
- **Training Materials:** The consultant will develop training materials, including presentations, manuals, and/or handouts, to support staff and partners in understanding and implementing the remote monitoring guidelines and SoPs effectively.

### Recommended Guideline Outline:

Whilst the consultant will have the space to suggest the suitable guideline outline based on the desk review results and Tearfund's input, the below outline is to be considered as a basis of what we were thinking of developing. The consultant is strongly encouraged to refer to the below outline while drafting the new guideline.

1. Implementation Guidance (Remote monitoring COVID guide has content on the same)
  - 1.1. Remote Monitoring (RM) – Definition, Concept, Relevance
  - 1.2. Analyzing risks pertinent to the absence of remote monitoring
  - 1.3. Examples for interventions which can use remote monitoring within CCT, EEA and FS
  - 1.4. Scope and limitation of use of remote monitoring.
2. Tearfund Country Systems
  - 2.1 Partner Capacity development steps
    - a. Key tools
    - b. Approaches

- c. Applications
  - 2.2 Partner Programmatic Reporting and program team detailed verification and reconciliation with financial reports
    - a. Key tools
    - b. Approaches
    - c. Applications
  - 2.3 For a sample of projects, reviewing third party verification - through freelance field monitors, third party monitoring service providers and partner to partner monitoring practice.
    - a. Key tools
    - b. Approaches
    - c. Applications
  - 2.4 Improving monitoring practice and data collection approach for Tearfund ourselves
    - a. Key tools
      - i. Third Party Monitoring
    - b. Approaches
      - i. Potential partners for 3rd party monitoring (local organization)
      - ii. Freelance field monitors (utility and potential to employ)
      - iii. Partner to partner monitoring options in clusters or global level
      - iv. Links and networks to support in remote monitoring
    - c. Applications
- 3. Institutional processes and systems
  - 3.1 Adaptation of indicators for remote monitoring (Sample indicators and approaches)
    - a. Integration of remote monitoring capacity aspects in POCA
    - b. Updating or creating an additional partner monitoring visit checklist to be project monitoring and include minimum requirements for remote monitoring of partnership.
    - c. Risk Registers
    - d. Security Assessments
  - 3.2 Support avenue in the development – DME, Finance, Security and Operations
  - 3.3 Compliance to monitoring standards and reporting frequency
  - 3.4 Assessment of compliance with monitoring standards and/or beneficiary feedback
  - 3.5 Our systems and processes to use and promote remote monitoring
  - 3.6 How remote monitoring may be integrated into contracts and financial commitments.

## Timeframe

The consultancy is expected to start on the last week of October 2023 and conclude by February 2024. The consultant as a part of the inception report should provide a detailed work plan outlining key milestones and expected completion dates.

## Reporting and Accountability

The consultant will report to Tearfund's ENA Regional DME Advisor. The consultant should provide regular updates on project progress, seek feedback and guidance, and ensure effective communication throughout the assignment.

## Qualifications and Expertise

The consultant should possess:

- Proven expertise in project management, monitoring, and evaluation, with a focus on remote monitoring in challenging contexts such as Yemen and Afghanistan.
- Demonstrated experience in developing monitoring and evaluation guidelines, SOPs, and capacity-building materials tailored to specific regions.
- Sound knowledge of remote monitoring methodologies, best practices, and data protection principles in the humanitarian sector or relevant field.
- Strong analytical and writing skills, with the ability to present complex information in a clear and concise manner.
- Preferred experience working with the UN system, bilateral donors and NGOs in delivering monitoring and evaluation assignments.
- Familiarity with Tearfund's organisational values and project management standards is desirable.
- Excellent organisational and communication skills to engage with stakeholders and facilitate virtual training effectively.

## Application

Interested consultants are invited to submit the following documents to [dara.robin@tearfund.org](mailto:dara.robin@tearfund.org) by **October 11 2023**:

- A technical proposal that indicates how the consultant is going to undertake the activities highlighted in the ToR, a proposed methodology, timeframe and a suggested outline for the guideline and SOPs.
- A financial proposal indicating level of effort and daily rate.
- A capacity statement detailing the consultant's ability to deliver a quality remote monitoring guideline, including an overview of relevant work and technical experience
- At least 2 samples of previous relevant works undertaken.

- Contact details for 2 references for similar assignments done not more than 3 years ago
- Consultant CV
- Any appendices the consultant sees as relevant to the application.

## Evaluation and Selection

Applications will be evaluated based on the consultant's qualifications, experience in Afghanistan and Yemen, proposed approach, and alignment with ToR objectives. The below evaluation criteria will apply:

Criteria	Score
Consultant Education Background	5
Consultant Relevant Work Experience	15
Suggested Methodology and Proposed Guideline Outline	30
Previous Work Sample Quality	30
Financial Proposal	20

Only consultants who obtain a technical score of 70% and above shall be considered with the award being made to the candidate with the highest technical score.

## Reservation and Confidentiality

Tearfund reserves the right to withhold all or a portion of payment if performance is unsatisfactory, if works/outputs are incomplete, not delivered, or for failure to meet deadlines. In the event of the Consultant ending the contract prior to delivering all agreed upon outputs, a portion of the payments shall be extracted from the consultant fees.

The consultant shall uphold confidentiality on all information that is not in the public domain and shall not be involved in another assignment that represents a conflict of interest to the prevailing assignment.