HUMANITARIAN INNOVATION FUND:
JOURNEY TO SCALE STRATEGY DEVELOPMENT PHASE SUPPORT

Terms of Reference: 15 April 2020

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ABOUT ELRHA

We are Elrha. A global charity that finds solutions to complex humanitarian problems through research and innovation. We are an established actor in the humanitarian community, working in partnership with humanitarian organisations, researchers, innovators, and the private sector to tackle some of the most difficult challenges facing people all over the world.

We equip humanitarian responders with knowledge of what works, so that people affected by crises get the right help when they need it most. We have supported more than 200 world-class research studies and innovation projects, championing new ideas and different approaches to evidence what works in humanitarian response.

Our Programmes
Elrha has two successful humanitarian programmes; Research for Health in Humanitarian Crises (R2HC) and the Humanitarian Innovation Fund (HIF).

R2HC
The R2HC programme aims to improve health outcomes for people affected by humanitarian crises by strengthening the evidence base for public health interventions.
This globally recognised research programme focuses on maximising the potential for public health research to bring about positive change in humanitarian response and helps inform decision making in humanitarian response. Since it was established in 2013, it has funded more than 50 research studies across a range of public health fields, bringing together researchers and humanitarian practitioners to undertake vital research.

The HIF:  
The HIF programme improves outcomes for people affected by humanitarian crises by identifying, nurturing and sharing more effective, scalable solutions.

The HIF is a globally recognised programme leading on the development and testing of innovation in the humanitarian system. Established in 2011, it was the first of its kind: an independent, grant-making programme open to the entire humanitarian community. It now leads the way in funding, supporting, and managing innovation at every stage of the process.

The HIF’s portfolio of funded projects has informed a more detailed understanding of what successful innovation looks like, and what it can achieve for the humanitarian community. This work is leading the global conversation on innovation in humanitarian response.

BACKGROUND AND CONTEXT

To date, the HIF has funded and provided support for over 150 innovations, many of which have demonstrated strong potential to address important problems in the sector. However, scaling humanitarian innovation remains a critical challenge for the global humanitarian community.

Too often promising innovations fail to move beyond initial pilots to become fully realised and sustainable solutions that achieve wider uptake. This means work and resources are wasted, and great ideas don’t reach their full potential. In a resource-constrained sector, there is a need to generate greater impact from investments in innovation. In direct response to this challenge, we established Journey to Scale.

The first round of Journey to Scale (J2S) was launched in 2016 and supported three promising humanitarian innovations: Field Ready, Translators without Borders and Healing in Harmony. During the grant period, the projects were able to grow significantly, investing in improving their technical and organisational capabilities and capacity, and overseeing more than 20 new deployments of their innovations combined.

Our second round of J2S, launched in early 2020, will provide initial support for ten shortlisted teams to develop scaling strategies for their innovations. We will then award five teams with the strongest proposals flexible funding of up to 580,000 GBP each to explore different scale pathways and refine their approach.

These Terms of Reference are for the provision of innovation management support, in collaboration with the HIF team, for Journey to Scale during the Strategy Development phase.
This work is being funded by the Netherlands Ministry of Foreign Affairs with support from the UK Department for International Development.

OVERVIEW OF JOURNEY TO SCALE

Journey to Scale (J2S) is aimed at humanitarian innovators who have successfully piloted their solution in at least one humanitarian setting and are now looking to scale the impact of their innovation. J2S includes two phases: Strategy Development, to help innovation teams develop their scaling vision and strategy; and Strategy Implementation, to enable them to implement, test and iterate their approach.

Following an open application process, ten innovation teams will be selected to take part in the Strategy Development phase. Between May and September 2020, the ten selected teams will take part in tailored online learning opportunities and receive remote mentoring and support to develop a coherent and comprehensive scaling vision and strategy.

At the end of the Strategy Development phase, the ten teams will be invited to submit their scaling strategy as part of a final proposal. The five strongest proposals will progress to the Strategy Implementation phase, and each successful team will receive up to 580,000 GBP in grant funding.

More information about Journey to Scale can be found in the Journey to Scale handbook.\(^1\) Due to Covid-19, the face-to-face workshop that was originally proposed to be part of the Strategy Development phase, and is mentioned in the handbook, will no longer take place.

PURPOSE AND OBJECTIVES

The purpose of this consultancy is to work with Elrha’s Innovation Managers (IMs) to provide innovation management support for the Strategy Development phase of J2S (May–September 2020).

The objective of this work is to help the shortlisted teams develop coherent and comprehensive scaling strategies. This will involve the selected consultant(s) working with the IMs to develop and deliver a four-month curriculum of support for the shortlisted teams. The selected consultant(s) will help guide both the focus and development of curriculum content, with consideration of appropriate channels for delivery.

It is intended that this work will draw extensively from Elrha’s Humanitarian Innovation Guide both in terms of the structure of the overall programme, and the tools and guidance that will be used to inform the process.\(^2\) We also expect a strong evaluative component focused on learning more about what works and what doesn’t in delivering strategy development support. This learning will be used to inform future updates to our grantee support offer and to the Humanitarian Innovation Guide.

\(^1\) See Journey to Scale handbook: https://www.elrha.org/funding-opportunity/journey-to-scale/
\(^2\) See Scale guidance: https://higuide.elrha.org/toolkits/scale/
The curriculum is expected to be delivered through a mix of channels, such as but not limited to, learning management systems (LMS), webinars, online workshops, online collaboration tools, video conferencing, email support, and document feedback.\(^3\)

The consultant(s) will directly deliver parts of the curriculum themselves, with the IMs delivering other parts with input from the consultant(s). This will be decided on the basis of capacity and complementary skillsets. Where the consultant(s) are supporting the IMs, this will involve acting as a sounding board and providing documented or verbal feedback.

The following five questions will guide the development of the Strategy Development curriculum:

- What is the nature of the innovation and how scalable is it?
- How mature is the innovation and what supporting infrastructure is currently in place?
- What is the envisaged end state and what is the three-year vision for Journey to Scale?
- How do the teams propose to get from the current state to the envisaged end state?
- How should progress be monitored?

It is expected that the Strategy Development curriculum will cover the following areas:

- Agreeing principles of success (what success looks like)
- Assessing each innovation in terms of level of complexity, theory of change, maturity, evidence base, business model and supporting infrastructure
- Exploring the problems that each team is addressing, the market for solutions, and potential barriers
- Setting scaling goals and understanding pathways to scale, translating these into a three-year strategy

**ACTIVITIES**

The key activities envisaged are as follows:

1. Designing the curriculum in collaboration with Innovation Managers, including:
   - Identifying key learning objectives for teams in the Strategy Development phase
   - Shaping modules to guide the Strategy Development phase, achieving an appropriate balance between comprehensiveness and feasibility
   - Identifying a clear and coherent pathway to guide the teams through the modules, culminating in the development of their scaling strategies

2. Designing and developing content for modules in collaboration with Innovation Managers, including:
   - Planning and structuring content for each module, identifying an appropriate mix of learning and development activities, as well as relevant tools and resources
   - Advising on appropriate channels for delivery, depending on objectives and level of customisation necessary for individual teams to progress

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\(^3\) We aim to utilise Elrha’s existing software and free software where possible. The purchase of new software on recommendation from the consultant(s) should be part of the budget submitted in response to this ToR.
o Designing and developing module content for delivery across a range of different platforms, such as but not limited to, learning management systems (LMS), webinars, online workshops, online collaboration tools, video conferencing, email support, and document feedback

3. Directly delivering content and providing coaching and support to the innovation teams, including:
   o Delivering module content in group sessions to all teams across different platforms, including webinars and online workshops
   o Providing remote coaching and support to individual teams through video conferencing or other forms of online collaboration
   o Reviewing and providing feedback on key documents developed by the teams

4. In collaboration with Innovation Managers and Elrha’s MEAL team, designing and delivering a light-touch Monitoring & Evaluation component for the support programme, including:
   o Contributing to an M&E plan to capture feedback and learning throughout the Strategy Development phase
   o Contributing to the development of surveys and other mechanisms for capturing feedback on individual modules
   o Facilitating a learning and reflections workshop at the end of the Strategy Development phase, involving Innovation Managers and innovation teams
   o Providing recommendations on the provision of future similar grantee support programmes, as well as additions, updates and amendments to Elrha’s Humanitarian Innovation Guide

DELIVERABLES REQUIRED

Working with the Innovation Managers the consultant(s) is expected to deliver a number of key documents, including:

- Curriculum overview
- Module content outlines and delivery proposals
- Module content (e.g., slide-decks, learning documents, LMS content)
- M&E analysis and future recommendations report (3-8 pages)

Working with the Innovation Managers and Elrha’s MEAL team the consultant(s) is expected to provide structured input into key documents, including:

- M&E plan
- M&E content for each module (e.g., surveys, interview questions)

The consultant(s) is expected to deliver a number of interventions, such as but not limited to:

- Delivery of group module content (e.g., group webinars, online workshops)
- Delivery of direct support to innovation teams, including review of final strategy (approx. one intervention per module per project)
- Facilitated a learning and reflections workshop
TIMELINE

The intended start date is May 2020 and the period of implementation of the contract will be maximum five months from this date.

The final deliverables must be completed by the end of September 2020 with the deadlines for interim deliverables in the table below.

<table>
<thead>
<tr>
<th>Interim deliverables</th>
<th>Deadline</th>
</tr>
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<tbody>
<tr>
<td>Curriculum overview document</td>
<td>Early June</td>
</tr>
<tr>
<td>M&amp;E plan input</td>
<td>Mid June</td>
</tr>
<tr>
<td>Detailed content plans for modules, including M&amp;E input</td>
<td>Mid July</td>
</tr>
<tr>
<td>Delivery of all curriculum modules, including direct team support</td>
<td>Mid September</td>
</tr>
<tr>
<td>Facilitation of learning workshop</td>
<td>End September</td>
</tr>
<tr>
<td>M&amp;E report (3-8 pages)</td>
<td>Mid October</td>
</tr>
</tbody>
</table>

NB – We expect that a significant proportion of the work involved in planning and developing content will be carried out early in the contract, in June and July 2020. It is therefore vital that the selected consultant(s) are able have sufficient availability during this period. These and additional deadlines for key documents will be further discussed and agreed with the successful candidate(s).

REPORTING LINES

The consultant(s) will work closely with one or more of Elrha’s Innovation Managers who will have day-to-day oversight of the project. The selected consultant(s) will be expected to work closely with the HIF programme team on the details of the design and delivery of the Strategy Development curriculum and to maximise the utility of the deliverables. Relevant documents produced by Elrha will be made available to the selected candidate.

QUALIFICATIONS AND EXPERIENCE

We welcome applications from individuals or teams/collaborations with the relevant capabilities and expertise to undertake the consultancy. However, our preference is for small teams with clearly defined expertise relating to design and delivery of the curriculum. The following experience should be demonstrated in applications:

- Strong knowledge and demonstrable experience of the humanitarian sector and the issues and challenges faced by organisations operating in humanitarian settings
- Strong knowledge and demonstrable experience of humanitarian innovation management, and, in particular, supporting projects to scale
- Strong knowledge and demonstrable experience of relevant tools and approaches, eg, theory of change, business modelling, market mapping
- Strong knowledge and demonstrable experience of learning design, including the design of short courses, workshops, and online learning experiences
- Strong knowledge of coaching techniques, and demonstrable experience of providing coaching support
- Ability to communicate complex material in a clear and concise manner
- Ability to communicate with others effectively, build relationships remotely, and provide tailored remote support
- Ability to deliver against the timeline
- Able to initiate work in May 2020

BUDGET

The total available budget is £40,000 excluding UK VAT but including any taxes that overseas suppliers may be liable for outside the UK.

**NB – Due to the size and nature of this work, we would like applicants to communicate their proposed approach in terms of ‘core’ activities and ‘supplementary’ activities. This should be reflected in the narrative and in the budget submitted. We would expect the ‘core’ activities to be achieved within a budget of approximately £25,000 and ‘supplementary’ activities within a budget of approximately £15,000 (both excluding VAT).**

The budget submitted to us should be broken down by activity and with any allocations for individual team members shown clearly. This should include any software costs and other expenses. Please indicate if you/your company is VAT registered and where.

Please note that payment is in arrears and linked to satisfactory completion of specific tasks (ie, interim deliverables) by the deadlines specified in the timeline.

PROPOSAL SUBMISSION

The application deadline is 23:59 BST on 10 May 2020. We will not be able to consider incomplete applications or applications submitted after the deadline.

We would expect applications to come from teams/collaborations to provide the breadth of skills required, but we also welcome applications from individual consultants. If applying as a team, each member of the team must have a clearly defined role related to their specific areas of expertise and there must be a lead point of contact for Elrha.

**NB – We strongly encourage potential applicants to get in touch with HIF team ahead of submission to discuss their proposal and our requirements. Please email requests to hif@elrha.org for the attention of Ian McClelland and Abi Taylor.**
We are looking for proposals to demonstrate a concise and clear communication style. Proposals can be submitted as Word or PDF documents, and should include:

- Summary of candidate(s) and demonstration of relevant experience, including CVs where appropriate
- Covering letter, setting out interest in and suitability for this project against the candidate requirements (maximum 1 page)
- Examples of relevant research, consultation and publications work conducted previously (no longer than 2 pages)
- Outline of proposed approach, timeline and plan to meet deliverables (no longer than 4 pages)
  - The approach, timeline and plan should include detailed proposals for the development and delivery of the curriculum and direct support, eg, number of interventions via learning management systems (LMS), webinars, online workshops, online collaboration tools, video conferencing, email support, and document feedback
  - The approach, timeline and plan should be broken down into ‘core activities’ with a budget of approximately £25,000 excluding UK VAT, and ‘supplementary activities’ with a budget of approximately £15,000 excluding UK VAT
- Proposed budget broken down by activity (‘core’ and ‘supplementary’), including day rate (if relevant) in £GBP, all costs, and any taxes (eg, VAT)

Please submit applications to hif@elrha.org for the attention of Ian McClelland and Abi Taylor and with the headline ‘Journey to Scale Strategy Development Support’.

**EVALUATION**

The quality of each technical offer will be evaluated in accordance with the award criteria and the weighting detailed in the evaluation grid below. The award criteria will be examined in accordance with the requirements indicated in these terms of reference.

Upon completion of the technical evaluation, the financial offers will be evaluated. Financial offers exceeding the maximum budget available for the contract are unacceptable and will be eliminated. The best price-quality ratio is established by weighing technical quality against price on a 70/30 basis.

<table>
<thead>
<tr>
<th>Evaluation criteria</th>
<th>Maximum score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualifications, experience, knowledge and track record of key staff (including coherence with purpose, objective(s), key activities, and expected deliverables)</td>
<td>[40]</td>
</tr>
<tr>
<td>Proposed approach and methodology</td>
<td>[30]</td>
</tr>
<tr>
<td>Financial offer/value for money</td>
<td>[30]</td>
</tr>
<tr>
<td>Overall total score</td>
<td>[100]</td>
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</tbody>
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DUE DILIGENCE CHECKS AND CONTRACTING

We must ensure any potential supplier is evaluated for compliance to relevant statutory and quality requirements, and that appropriate due diligence checks are carried out, proportionate to the nature and value of the contract.

Due diligence is our process of reviewing your organisation’s finances, governance structure and business activities (including vetting key team members and/or board members, as applicable). We carry out this process on all our suppliers before we can enter into an agreement.

We run our contracting process in parallel to our due diligence. We have a standard agreement which all providers are expected to sign up to. You can request a copy to info@elrha.org. If you have any questions about this, please include them in your submission.

Thank you.