

Terms of Reference for Evaluation and Strategic Planning - Globethics

1. Background/Context

[Globethics](#), established in 2004, is an international non-governmental organisation headquartered in Geneva, Switzerland. Operating as an independent, not-for-profit foundation with a global Board and affiliated centres worldwide, Globethics was founded during an international workshop convened by ethics professor Christoph Stückelberger to promote ethical leadership through academic and public engagement. The organisation aims to bridge diverse cultural, religious, philosophical, and humanist ethical perspectives on global issues. Globethics has special consultative status at the United Nations Economic and Social Council (UN ECOSOC).

Over the years, Globethics has significantly expanded its network and activities. It hosts [one of the largest digital libraries on ethics](#), operates a multilingual [publishing house](#), offers dedicated [courses through its Academy](#) and has established representation across Asia, Africa, North America, and South America. The organisation facilitates global and policy engagement through events like the [Global Ethics Forum](#) and undertakes research, training, and capacity-building projects.

In 2016, the Foundation's Board focused Globethics' efforts on ethics in higher education to enhance ethical governance and administration within institutions and integrate ethics across curricula for fostering responsible leadership. This strategic shift led to the establishment of the Globethics Academy and the formation of the Globethics Consortium on Ethics in Higher Education. Globethics attained accreditation as a distance learning centre from the European Agency for Higher Education and Accreditation (EAHEA) in 2021 and from the British Accreditation Council for independent further and higher education in 2022, highlighting its role in ethical leadership development and international academic collaboration.

In 2023, Globethics launched its [Strategy 2023-2027](#), focusing on “Ethical leadership” through higher education and global/policy engagement. The strategy is structured into two phases: the initial phase (2023-2024) focusing on organisational adjustment and consolidation, followed by a comprehensive evaluation to guide strategic adjustments and set new targets. The second phase, spanning from 2025 to 2027, presents opportunities for advancing institutional growth and expanding the transformative impact of the mission both regionally and globally.

The organisation is entering the evaluation of phase 1 and strategic planning of phase 2 of the Strategy 2023-2027 in its 20th anniversary year accompanied by the transition from the Founder / President to a new President in September 2024. The recent development of the global and policy engagement at Globethics opened new avenues of presence and contribution on the regional and global levels, while expanding the network and partnership of Globethics among the multilateral and non-governmental organisations. At the same time, several external elements have been observed to be considered for the next phase, including, changes in donors’ funding agenda and priorities; the transformations related to artificial intelligence in areas of research and online resources, challenging established programmes such as the online library and publications; a deteriorating geopolitical and macroeconomic environment; changing landscape of humanitarian and development financing; and the evolution of the ethics “market”. Such developments demonstrate the importance of revisiting the scope and relevance of Globethics’ current work and of planning the new phase in a strategic manner.

Against this backdrop, Globethics is opening the call for a consultant to conduct “an evidence-based evaluation and strategic planning research” project from August 2024 to January 2025.

2. Purpose and the Scope of the Consultancy

The purpose of this consultancy is to evaluate Globethics’ work during the first phase of the Strategy (2023-2024) and to propose evidence-based elements for strategic planning for the period 2025-2030.

The scope of the consultancy includes two components.

The first component is the evaluation of Globethics’ work during the first phase (2023-2024) of its Strategy 2023-2027.

The consultant is asked to

- evaluate the extent to which the Strategy has been implemented successfully in the first phase in 2023-2024 vis-à-vis Globethics' current strategic positioning, vision, mission, theory of change and 8 strategic priorities, responses and activities.
- Analyse strengths with a view to building upon opportunities by using SWOT (Strengths, Weaknesses, Opportunities, Threats) or other tools.
- Conduct a comprehensive evaluation of the first phase implementation from six key aspects according to [OECD Evaluation Criteria](#), namely: *Relevance*. Is the intervention doing the right things? *Coherence*. How well does the intervention fit? *Effectiveness*. Is the intervention achieving its objectives? *Efficiency*. How well are resources being used? *Impact*. What difference does the intervention make? *Sustainability*. Will the benefits last?

The second component is contribution to the strategic planning. Strategic planning is expected to provide inputs for strategic thinking, which guides the actual strategic formation of the organisation. Building on the evaluation results of the implementation of the ongoing Strategy in 2023-2024 (the first component), the consultancy will analyse operating environment, conduct benchmarking research, and provide guidelines for strategic planning for the phase 2025-2030. The report will include a systematic diagnosis of the organizational Strategy and provide concrete recommendations about five issues a) benchmarking, b) organizational strategy c) strategic and geographic focus, d) main initiatives and actions, and e) financial planning.

Please refer to the methodology part about proposed research methods. More specifically, four areas of recommendations are as follows.

a) Benchmarking

- Market study about ethics and ethical leadership globally that leads to define the benchmark for Globethics for the coming five years.
- Identification of key potential partnerships, joint ventures, or merging or acquisition opportunities.
- Explore strategic frameworks and propose the best one for the next phase for Globethics (red/blue ocean? Etc.)

b) Organisational strategy

- Review of and, if appropriate, proposed revisions to the vision, mission and priorities of the organisation and its overall direction on its way forward.

- Identify new strategic direction from 2025 to 2030 that would best enable Globethics to advance its mission and vision.
- Help Globethics understand its capacities, problems and resources.
- Propose the needed business and operating model for Globethics that are efficient, innovative, and impactful in the current global context, offering multiple strategic options.
- Recommend organisational structural adjustments to support the new strategic direction from 2025 to 2030.
- Consider modifications in size, structure, and geographic focus to enhance organisational agility, strategic thinking and planning, and effectiveness.

c) Strategic and geographic focus

- Define the priority thematic areas for future strategic engagement.
- Define the geographic focus based on evidence-based analysis.
- Specify programmes at Globethics which lost their relevance or unable to compete with existing similar ones.

d) Main initiatives and actions

- Help in building up the main initiative(s) and actions, also called star products/services of the organization, that have significant impact and clear demand, based on evaluations and analysis.
- Define and sharpen the value proposition (WHAT), target beneficiaries/clients (WHO buys), and implementation strategy (HOW) for the star products/services.
- Outline sustainable business models for star product/services, emphasising funding sources, revenue generation and long-term viability.

e) Financial planning

- Develop a strategic financing projection aligned with the repositioned strategy and star products/services.
- Define strategies to enhance financial sustainability and reduce dependency on specific funding sources.

3. Methodology

The consultant will employ a participatory approach, engaging closely with internal and external stakeholders of Globethics. The methodology encompasses the following steps:

- Reviewing the organisation situational context by utilising strategic planning analytical tools, including desk research, interviews, and focus group discussions.
- Examining internal and external documents while benchmarking with similar organisations, i.e. study successful organisational models in related fields for learning and potential adoption/adaptation
- Analysing the changes in global trends and in the operating environment to establish the accuracy and relevance of the strategic responses to global trends.
- Conducting consultations with key stakeholders, including the Board, Senior management, staff and partners.
- Reviewing existing and potential donors' and partners' strategic plans to ensure alignment.
- Participating in a strategic planning seminar to solicit input and foster consensus among stakeholders.
- Evaluating the existing organisational structure and capacities.
- Updating the strategic plan and integrating feedback from stakeholders.

4. Reporting, feedback and coordination

The consultant will work closely with the head of the Impact, Innovation, and Development Unit, with continuous coordination, and reporting.

The consultant will engage with the Board of the organisation, and its Executive committee, and have regular meetings with and feedback from the Executive director.

5. Expected Deliverables

- 1) **Evaluation Report of the first Phase (2024-2025) of the Strategy (2023-2027)**, minimum 12 pages (A4, font size 11).
 1. An executive summary
 2. Results of the evaluation of 6 aspects (Relevance. Coherence. Effectiveness. Efficiency. Impact. Sustainability) during the implementation of the first phase (2023-2024).
 3. Provide an analysis of achievements, challenges faced, and lessons learned.
 4. Identify key success factors and areas needing improvement.
 5. Please refer to the scope of consultancy for details

- 2) **Strategic Planning Report**, minimum 24 pages (A4, font size 11).
 1. An executive summary
 2. A systematic diagnosis of the organizational Strategy
 3. Provide concrete recommendations about a) benchmarking, b) organizational strategy c) strategic and geographic focus, d) main initiatives and actions, and e) financial planning.
 4. Please refer to the scope of consultancy for details

6. Duration and Timelines of the Consultancy

The consultancy will commit at least 30 working days during 6 months from August 2024 to January 2025.

Proposed Timeline and Task Management:

No.	Tasks/deliverables	Timing
1	Submit to Globethics Unit of Impact, Innovation and Development (IID) the framework and detailed workplan of the evaluation and strategic planning. (IID will provide comments in 5 working days after receiving the submission.)	20/08/2024
2	Submit revised version of the framework and detailed workplan, based on comments of IID, validated	31/08/2024
3	Submit the 1 st draft of the Evaluation report to IID. (IID will provide comments in 5 working days after receiving the submission.)	30/09/2024

No.	Tasks/deliverables	Timing
4	Submit the 2 nd draft Evaluation report	15/10/2024
5	Submit the 1st draft of Strategic planning report , (IID will provide comments in 5 working days after receiving the submission.)	30/10/2024
6	Present the 2 nd draft evaluation report (No. 4) and the revised draft of Strategic Planning Report (No.5) at a <u>seminar</u> organized by Globethics with key external stakeholders, senior management and staff to discuss and get feedback and strategic inputs	15-16/11/2024 in Geneva
7	Submit the final Evaluation report , by incorporating inputs from the seminar (No.6)	29/11/2024
8	Submit the 2nd draft of strategic planning report based on the inputs and feedback from the seminar (No.6) and further research and analysis. (Globethics presents it to the Board and collects final inputs. IID gives feedback to the consultancy before 15 December 2024)	05/12/2024
8	Submit the final Strategic planning report .	15/01/2025

7. Qualifications/Competence Consultancy

Mandatory for the Consultant/cy team:

1. Expertise in Evaluation and Strategic Planning: Demonstrated in conducting evaluation and strategic planning exercises for international organisations and/or NGOs, preferably in the fields of ethics, education, peace, development, or governance.
2. Expertise in Market and Political Analysis: Proficiency in conducting comprehensive market and political analyses to inform strategic decision-making, including identifying global trends and ethical challenges.
3. Strategic Framework Development: Proven ability to develop detailed strategic frameworks encompassing Vision, Mission, Theory of Change, and business models for organizations undergoing strategic repositioning.
4. Recommendation Development: Skill in crafting precise and actionable recommendations that address organizational focus and strategic repositioning, considering diverse thematic and geographic options.
5. Report Writing and Presentation: Strong capability in preparing clear and compelling reports and presentations that communicate complex strategic insights and recommendations to stakeholders.
6. Project Management: Proficiency in project management, including adhering to timelines, managing deliverables, and ensuring high-quality outputs within the specified consultancy period.
7. Commitment to Impact and Sustainability: Commitment to developing strategies that not only deliver short-term benefits but also lay a foundation for sustainable growth and impact over time.
8. Flexibility and Adaptability: Ability to adapt strategies based on evolving organizational needs, external factors, and stakeholder feedback throughout the consultancy process.

8. Guideline for Submission of Proposal Documents

The consultant is expected to submit the following documents/information to demonstrate their suitability:

- 1) Technical full Proposal including:
 - a. methodology, timeline, and process.
 - b. Team members, with the full CV of at least the team lead
- 2) Consultant profile explaining why you are the most suitable for this consultancy including confirmation on availability to complete the project in the prescribed period;
- 3) Financial Proposal: specifying the number of consultancy days as well as the requested amount of the fee per day.

Please **submit your application** to jobs@globethics.net by **24h00 CEST on 5 August 2024**.