

TERMS OF REFERENCE (TOR)

For Implementation of Model Unions Initiative

1. INTRODUCTION AND CONTEXT

Country	Bangladesh
Project title	Together for Tomorrow: Enhancing Cooperation for Social Sustainability
Grant number	Nagorikata-CfP III-DALIT-019
Technical Support By	GFA Consulting Group
Funded By	Swiss Agency for Development and Cooperation, Global Affairs Canada, and European Union
Project period:	15 May 2025 to 14 May 2027
Implementing partner	DALIT

1.1 About DALIT: DALIT is a non-governmental, non-partisan, and non-profit organization committed to empowering Dalit and other marginalized communities in Bangladesh since 1998. With operations across Khulna, Jashore, Satkhira, Bagerhat, and Narail, DALIT focuses on reducing social exclusion through education, vocational training, healthcare, WASH services, and climate resilience initiatives. The organization actively raises awareness on caste-based discrimination and promotes community participation in social, economic, and political spheres. Its key interventions include education for disadvantaged children, providing skill development and entrepreneurship training, offering allopathic and Ayurvedic healthcare services through Dalit Hospital, and implementing sustainable water and sanitation solutions. By integrating grassroots action with advocacy, DALIT strives to ensure social integration, gender equality, and resilience among marginalized groups in the face of systemic challenges and environmental risks.

1.2 Detail of the Project: Together for Tomorrow: Enhancing Cooperation for Social Sustainability,” seeks to strengthen inclusive civic engagement and participatory governance among marginalised communities, particularly Dalits, women, and youth in **Bajua, Banishanta, and Laudobe unions of Dacope Upazila, Khulna**. Rooted in DALIT’s longstanding education initiatives, this intervention expands into the civic engagement to address systemic barriers such as socio-economic exclusion, gender inequality, and limited access to governance processes. The project is strategically aligned with the **Eighth Five-Year Plan**, and **SDGs 5 and 16**, ensuring coherence with both national and international development priorities. Through participatory approaches, it aims to amplify community voices, foster collaboration among civil society and government institutions, and build an enabling environment for inclusive decision-making and social accountability.

Over an implementation period of two years, the project will achieve four interlinked outcomes: (1) increasing outreach and mobilisation of diverse citizens, (2) expanding partnerships and cooperation among civil society actors, (3) strengthening interaction and dialogue between communities and government institutions for inclusive policy-making, and (4) enhancing the capacities of CSOs and youth networks for sustained civic engagement. Key activities include participatory research, formation of civic engagement youth committees, Model Union initiatives, community campaigns, advocacy forums, and the development of a mobile grievance redressal application. By promoting digital inclusion, evidence-based advocacy, and institutional partnerships, the project envisions an empowered, informed, and cohesive civic space in coastal Bangladesh where marginalised groups actively shape governance and contribute to equitable and sustainable community development.

1.3 Project Target Location: The research focuses on three selected unions of Dacope Upazila in the southern part of Bangladesh: Bajua, Banishanta, and Laudobe.

1.4 Target Groups of the Project: 5,000 people (approx.) from marginalized Dalit, fisherfolk, and landless communities.

2. OBJECTIVES OF THE ASSIGNMENT

The specific objectives are to:

- Conduct participatory baseline mapping of resources, governance gaps, and service delivery challenges
- Facilitate community consultations, FGDs, and household surveys in selected unions
- Strengthen Union Parishad capacity through training, coaching, and mentoring
- Establish and operationalize digital Union Parishad databases
- Design and implement innovative local revenue generation strategies (e.g., tax fairs, awareness campaigns)
- Facilitate development planning workshops and participatory planning systems
- Support resource mobilization and proposal development
- Institutionalize Model Union mechanisms through formal agreements and governance structures

3. SCOPE OF WORK

The consultant/firm will design and implement the **Model Unions Initiative as an integrated local governance transformation system**, combining **citizen-led planning, digital governance, fiscal strengthening, and institutional capacity building**. The approach will move beyond conventional training and surveys toward a **live, adaptive, and data-driven Union transformation model**.

The scope of work is structured under eight interlinked innovation pillars:

3.1 Community Intelligence & Participatory Systems Mapping (CIPSM)

The consultant/firm will establish a **community-generated evidence system** through:

- Digital and paper-based household surveys capturing socio-economic, service access, and vulnerability profiles
- Focus Group Discussions (FGDs) with women, youth, elderly, and marginalized groups
- Mapping of service ecosystems (health, education, sanitation, agriculture, social safety nets)
- Identification of governance bottlenecks and exclusion patterns
- Stakeholder mapping using influence-interest and inclusion lenses
- Creation of a Union Resource & Gap Atlas as a baseline intelligence tool

Output: A dynamic “Union Intelligence Map” for planning and decision-making.

3.2 Institutional Transformation & Adaptive Capacity Building

The consultant/firm will strengthen Union Parishads as adaptive local governance institutions through:

- Competency-based training for Chairpersons, Members, and staff on:
 - Financial governance and local fiscal systems
 - Digital governance and data-driven decision-making
 - Participatory planning and inclusive service delivery
- Introduction of **performance improvement coaching cycles**
- On-the-job mentoring and real-time problem-solving support
- Institutional learning reviews to improve Union performance continuously

Output: Shift from traditional training to continuous institutional performance improvement system.

3.3 Digital Governance & Smart Union Database System

The consultant/firm will establish a **Smart Union Data and Service Management System**, including:

- Design and deployment of a **centralized Union Parishad digital database**
- Digitization of citizen records, services, and tax information
- Development of a **real-time data entry and update mechanism**
- Integration of service delivery tracking (birth/death registration, social services, etc.)
- Development of a **dashboard for revenue, services, and performance indicators**
- Capacity building of Union staff for system maintenance and data use

Output: A functioning Digital Model Union Dashboard for evidence-based governance.

3.4 Local Fiscal Innovation & Revenue Acceleration System

The consultant/firm will introduce innovative approaches to strengthen Union revenue systems:

- Design and implementation of **Community Tax Engagement Fairs**

- Behavioral change campaigns on civic responsibility and tax contribution
- Modernization of tax collection systems using digital records
- Introduction of **transparent revenue tracking mechanisms**
- Support for Union-level fiscal planning and forecasting
- Community feedback mechanisms on service-to-tax linkage

Output: A more transparent, participatory, and efficient local revenue ecosystem.

3.5 Participatory Planning & Adaptive Development System

The consultant/firm will support the establishment of **living planning systems**, including:

- Facilitation of **annual, quarterly, and rolling planning workshops**
- Integration of community priorities into Union development plans
- Alignment of plans with available budgets and resource flows
- Introduction of **adaptive planning tools based on real-time data**
- Creation of Union Development Priority Matrix for decision-making

Output: A flexible, citizen-responsive planning system linked to real needs.

3.6 Integrated Resource Mobilisation & Partnership Development

The consultant/firm will strengthen Union capacity for sustainable financing through:

- Training on proposal writing, concept development, and donor engagement
- Identification of government, NGO, and private sector funding opportunities
- Development of Union Resource Mobilisation Strategy
- Facilitation of partnerships with local and national institutions
- Creation of a pipeline of fundable community development initiatives

Output: Unions positioned as active resource mobilisers, not passive recipients.

3.7 Real-Time Monitoring, Learning & Adaptive Management (MEL-AM)

The consultant/firm will establish a **real-time learning and accountability system**, including:

- Development of **Model Union Performance Indicators Dashboard**
- Field-based continuous monitoring and verification visits
- Quarterly performance review and reflection sessions with stakeholders
- Documentation of **innovation stories, case studies, and success pathways**
- Establishment of a **learning loop system** linking data → action → improvement
- Final evaluation and scalability roadmap for replication

Output: A learning-driven governance model that continuously improves itself.

4. EXPECTED DELIVERABLES

The consultant/firm will produce the following outputs:

- Inception Report with detailed implementation plan
- Baseline Resource and Governance Mapping Report
- Community Consultation and FGD Report
- Training Modules and Capacity Building Reports
- Functional Union Parishad Database System
- Revenue Mobilisation Strategy and Implementation Report
- Participatory Development Planning Report
- Resource Mobilisation Toolkit and Training Outputs
- Monitoring and Evaluation Framework
- Quarterly and Final Implementation Reports
- Case Studies and Lessons Learned Documentation

5. IMPLEMENTATION APPROACH AND METHODOLOGY

The assignment will adopt a **participatory, technology-enabled, and systems-strengthening approach**, including:

- Community-driven participatory planning
- Gender and social inclusion mainstreaming
- Digital governance tools (database systems)
- Results-based management (RBM)
- Capacity substitution and handholding approach
- Co-creation with Union Parishads and youth groups

6. INSTITUTIONAL ARRANGEMENTS

- DALIT will provide overall coordination and oversight
- Union Parishads will act as primary implementation partners
- Youth groups and civil society organizations will support field-level activities
- Consultant/Firm will ensure coordination with local government institutions
- Formal MoUs will be signed with each Union Parishad defining roles and accountability

7. DURATION OF ASSIGNMENT

The assignment will be implemented over a period of **6 months** (extendable based on discussion).

8. KEY PERSONNEL REQUIREMENTS

The consultant/firm should deploy a multidisciplinary team including:

- Team Leader / Governance Specialist
- Local Government Specialist
- ICT / Database Specialist
- Community Mobilization Specialist
- M&E Specialist
- Training and Capacity Building Expert

9. REQUIRED QUALIFICATIONS AND SELECTION CRITERIA

- Minimum 10 years of experience in local governance, digital governance, or public sector strengthening
- Proven experience in Union Parishad or local government capacity building
- Experience in participatory development and community engagement
- Experience in ICT4D (Information and Communication Technology for Development) preferred

Applicants are required to submit both a **technical** and a **financial proposal** as part of their application package.

The **technical proposal** should demonstrate the applicant understands of the Terms of Reference (ToR) and the feasibility of conducting the research within the proposed scope and timeline. It must include a concise description of the **research design, methodology, and work plan**, clearly indicating how the assignment will implement within the specified timeframe. The technical section should not exceed **seven (7) pages**.

The **financial proposal** must present a **comprehensive budget** covering all costs related to the assignment. It should specify the **daily consultancy rate (including applicable VAT)**, the **number of working days**, and all associated expenses such as **travel, accommodation, logistics, enumerator costs, transportation, and other operational expenditures**. A detailed **budget breakdown** is required, and all financial figures must be presented in **Bangladeshi Taka (BDT)**.

Applicants must also provide **proof of professional registration and tax compliance**, such as a valid **Tax Identification Number (TIN)** or equivalent documentation.

Additionally, applicants are required to submit an **up-to-date Curriculum Vitae (CV)** of the evaluator(s) along with **references** demonstrating relevant experience and previous assignments of a similar nature.

10. PAYMENT MODALITIES

Payments will be made in installments based on the outputs and deliverables outlined in the TOR and subject to DALIT's certification of satisfactory completion according to the work plan and policy. Payments will be made via bank transfer or account payee cheque in the name of the firm(s). Applicable VAT and taxes will be deducted at source in accordance with government regulations. The payment schedule is as follows:

- 30% upon approval of Inception Report
- 45% upon completion of baseline study & consultations, database development, capacity building, and revenue & planning interventions
- 25% upon submission and validation of the final report

11. APPLICATION PROCEDURE

Consultants or firms meeting the specified requirements are invited to submit their proposals, which should include the following:

- A cover letter outlining the consultant's or firm's suitability for the assignment.
- A Technical Proposal (weight: 70%).
- A Financial Proposal (weight: 30%).
- CVs of the lead consultant and key team members.

Interested consultants or firms should submit their technical and financial proposals via email to career.dalit@gmail.com, by **12 May 2026, 05:00 PM**. Please ensure the email subject line clearly states '**Model Union Initiative**'.