



INSTITUTE OF PUBLIC FINANCE (IPF)
TERMS OF REFERENCE
ORGANISATIONAL CAPACITY ASSESSMENT (OCA)

1. Background and Context

IPF is a public policy and public finance-focused institution committed to strengthening fiscal governance, public finance management, and evidence-informed policy engagement.

As IPF consolidates its strategic direction and positions within a rapidly evolving global funding landscape, the organization seeks to undertake a comprehensive Organizational Capacity Assessment (OCA) and Governance Review.

This exercise is intended to ensure that:

- Our structure supports our strategy.
- Our skills base aligns with our programmatic ambitions.
- Our leadership and governance arrangements are fit-for-purpose.
- We are institutionally resilient in the face of shifting global funding models and increasing accountability expectations.

The assessment will inform the development of a new organogram and provide a clear roadmap for strengthening IPF's institutional effectiveness and sustainability.

2. Purpose of the Assignment

The purpose of this assignment is to conduct a comprehensive assessment of IPF's

1. Organizational structure and staffing model
2. Technical, programmatic capacity and quality control
3. Leadership structure and capacity
4. Systems, policies, and operational effectiveness

The assessment will provide clear, actionable recommendations to guide institutional strengthening and strategic realignment over the next 3–5 years.

3. Specific tasks

The consultant/firm will:

a. Organizational structure and capacity

1. Assess the alignment between IPF's strategy, workstreams, and current structure.
2. Evaluate whether existing staffing levels and skill sets match current and anticipated programmatic priorities.

3. Identify capacity gaps, duplication, or misalignment.
4. Recommend an optimal organogram, including:
 - Clear and manageable reporting lines
 - Functional clustering of roles
 - Sequencing priority hires (if applicable)
 - Staff onboarding and development and outline their career paths in the organization.
5. Provide recommendations on optimal staffing levels and role alignment given current and projected funding scenarios.

b. Roles, reporting lines, and performance architecture

1. Clarify and refine roles and reporting lines across the organization.
2. Develop a framework for:
 - Substantive Job Descriptions (JDs)
 - Performance management system

c. Leadership assessment

1. Assess the capacity of IPF's senior leadership team :
 - Lead effectively
 - Navigate funding volatility
 - Manage institutional growth
2. Provide recommendations to strengthen the senior leadership team.

d. Institutional sustainability and funding readiness

1. Assess IPF's positioning within the shifting global funding environment.
2. Evaluate institutional readiness for:
 - Diversified funding models
 - Multi-donor compliance
 - Strategic partnerships
 - Growth and scale
3. Provide recommendations for institutional resilience, including:
 - Structural adjustments
 - Capability investments
 - Leadership strengthening

4. Scope of work

The assignment is expected to include:

- Document review (strategy, budgets, organogram, policies, past evaluations)



- Interviews with:
 - Board members
 - All staff
 - Selected staff who left the organization
- Skill and competency mapping
- Governance benchmarking
- Comparative review (if helpful) against peer institutions

The approach must be inclusive, consultative, and participatory.

5. Deliverables

The consultant/firm will produce:

1) Inception report

- Detailed methodology
- Tools and frameworks
- Work plan and timeline

2) Draft OCA & governance assessment report including;

- Diagnostic analysis
- Skills mapping matrix
- Leadership assessment findings
- Risk analysis

3) Proposed organogram

- Rationale for structure
- Phased staffing plan
- Reporting line architecture

4) Institutional strengthening roadmap

- Prioritized recommendations (Immediate, 6–12 months, 2–3 years)
- Responsible parties
- Resource implications

5) JD and performance framework template

- Standardized JD architecture
- Performance review framework

6) A final consolidated report and a board Presentation

Presentation of findings and recommendations for deliberation and approval.

6. Duration

The assignment is expected to take approximately [6–10 weeks], subject to final agreement.



7. Required qualifications

The consultant/firm should demonstrate:

- Proven experience conducting OCAs and governance assessments in non-profit or policy institutions
- Strong understanding of institutional development and change management
- Familiarity with public finance, public policy, or governance-focused institutions (desirable)

8. Proposal requirements

Interested consultants/firms should submit:

1. Technical Proposal
 - Understanding of the assignment
 - Methodology and approach
 - Work plan and timelines
 - Team composition and roles
 - Similar past assignments (minimum 3 references)
2. Financial Proposal
 - Detailed budget inclusive of all costs and taxes in Kenya Shillings
3. CVs of proposed team members

9. Reporting line

The consultant will report to the Chief Executive Officer and work closely with the Senior Leadership Team and Board Chair.

10. Submission

The deadline for submissions is **Friday, March 27, 2026, at 5 PM**. Interested organizations or individuals should make their applications by sending their proposal to info@ipfglobal.or.ke

IPF reserves the right to reject any or all proposals submitted and shall not be obliged to discuss the evaluation/selection process with the bidder. Only shortlisted organizations or individual/s will be contacted.