

Consulting services offered to MISEREOR's project partners – Practical tips and basic considerations

■ Guidelines for MISEREOR's partner organisations

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Place and date of publication: Aachen, Germany, May 2018

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Introduction

MISEREOR supports its project partners not only by providing financing but also by supplementing this in some cases with consulting services. These guidelines explain to partners and consultants MISEREOR's understanding of consulting services and how to draw up the corresponding cooperation arrangements.

MISEREOR offers consulting services to its project partners for a number of reasons, for example to

- enter into an in-depth dialogue with them on specific themes;
- support them in meeting specific cooperation requirements;
- open up the possibility of further strategic or organisational development.

In many cases MISEREOR provides the initial impetus for such consulting services – but it is also possible for partners to ask for or propose such support measures.

In Part 1 of the guidelines, we provide practical tips for MISEREOR's partner organisations that request or receive offers of consulting services from MISEREOR.

In Part 2 (from page 16 onwards), we explain MISEREOR's understanding of consulting services and outline various consulting approaches. Part 2 is primarily addressed to persons and organisations that undertake consulting work for MISEREOR or, for example, agencies that are responsible for a consulting fund for MISEREOR partner organisations. It also gives interested partner organisations an opportunity to take a closer look at this aspect of cooperation.

Part 1 – Practical tips on the consulting services offered by MISEREOR

1. General information

Three types of consulting services are offered in the cooperation between MISEREOR and its partner organisations:

- A. Delegated partner dialogues with experts
- B. Training and consulting services – obligatory in nature
- C. Training and consulting services – voluntary in nature

A. When and why does MISEREOR offer delegated partner dialogues?

- The conditions for hands-on development cooperation change over time: political conditions can alter such that civil society actors have greater or less scope for action; changes in economic conditions can open up new opportunities (e.g. training and jobs for disadvantaged population groups) or bring new risks (e.g. land grabbing or environmental pollution); and today, conditions in the world around us are being impacted primarily by climate change. As a result, it may be necessary not only to adapt on-site development work but also the cooperation between MISEREOR and its partner organisations.
- A productive dialogue about such changes takes time and a solid understanding of the specific theme. For this reason, MISEREOR often finds it expedient to engage experts to manage the dialogue on individual themes that are considered important. Within a specified time frame, these experts can conduct more in-depth exchanges with partner organisations and then relay the results back to MISEREOR.
- This is sometimes linked to training services on the specific theme for interested partner organisations (see also section C.)

What does such an offer mean for a partner organisation and how should it react?

As our focus here is on dialogue – in other words an exchange of views – we will be delighted if you

- *accept the offer of dialogue, and*
- *actively contribute your views and expectations, or*
- *inform us if either the date or the thematic content is not suitable.*

B. When and why does MISEREOR offer consulting services that are obligatory in nature?

- MISEREOR makes such offers when there are obstacles to the further support of projects operated by the partner organisation. Obstacles can be:
 - The project work and its effects are considered relevant, but the cooperation standards (e.g. with respect to financial and narrative reporting, outcome and impact planning and monitoring, transparent organisational structures with control bodies) are not being adequately complied with¹.
 - The project objectives are considered relevant, but MISEREOR has doubts about the effectiveness or sustainability of the project strategies.
- It is true that such offers of consulting services sometimes do not come about through "exchanges between equals". Situations can arise where MISEREOR must demand changes in cooperation. The reason is MISEREOR's responsibility and accountability for the funds made available to it.
- At the same time, however, such offers are always a sign of trust: if MISEREOR was not convinced that a partner generally produced good and important work or desired to do this, it would be more likely to terminate the cooperation than make an offer of consulting services.

What does such an offer mean for a partner organisation and how should it react?

- *Ask MISEREOR what exactly should be changed and why, i.e. from the donor's perspective.*
- *Consider with others in your organisation what such a change will mean for you and who will have to be involved in order for the corresponding change to be successful.*
- *Ensure as far as possible that the involved persons in your organisation are available beyond the time frame of the consulting assignment.*
- *Even if the consulting or training services are obligatory in nature, you still have scope to shape the process: for example, you can define priority areas, propose additional content and influence the scheduling. Use this scope for action and help secure the success of the process.*

¹ The support MISEREOR provides to projects is largely publicly funded. The standards governing the provision of this support are set by the German Federal Ministry for Economic Cooperation and Development (BMZ) and must be complied with by MISEREOR in its cooperation with partner organisations. MISEREOR is also accountable to all people making donations and must ensure that funding is used effectively and in line with the designated purpose.

C. When and why does MISEREOR offer consulting services that are voluntary in nature?

- Going beyond minimum standards, MISEREOR is keen to support its partner organisations in developing their work and strategies, and it wants to pass on lessons learned, further conceptual developments, and good ideas and solutions from the projects to other partners.
- For this reason, consulting offerings are sometimes developed that draw on the wealth of experience acquired by project partners, experts and MISEREOR colleagues.

What does such an offer mean for a partner organisation and how should it react?

- *Check whether this offer will advance your organisation and your work. Take it up if it fits your needs; turn it down if it isn't right at the time.*
- *If you want to take advantage of the offer, map out yourself what improvements this will bring for you. Make clear to the consultant and MISEREOR what your expectations are.*
- *Design the consulting process such that the desired change is likely to come about, for example by involving people who can also shape this change.*

What else should partners be aware of when they receive an offer of consulting services from MISEREOR?

- Consulting services are not a standard feature of cooperation with MISEREOR. In order to use the available funds as effectively as possible, MISEREOR examines each individual case to ensure that the consulting services are necessary and likely to be effective.
- The aim when providing consulting services is always to bring about a specific change, and they are therefore of limited duration. Consulting services are never set up as long-term external assistance.
- Consulting services only make sense if there is a will to change in the organisation receiving support. An open dialogue on this aspect is helpful.
- Consulting services rely on specific contact persons. These must be made known in the organisation being advised, and they should be available within the organisation beyond the time frame of the consulting assignment.
- The initial impetus for consulting services does not have to come from MISEREOR. If you need advice regarding your own work or if you have a proposal for a group of partner organisations, please get in touch with your contact at MISEREOR.

2. Checklist for partners who receive offers of consulting services from MISEREOR

Questions	Options for action
Clarification of the assignment	
What led MISEREOR to offer consulting services? Have preliminary talks already been held?	If necessary ask MISEREOR
Is it clear whether MISEREOR expects you to accept the offer (obligatory training/consulting services) or if participation is voluntary?	If necessary ask MISEREOR
Is this an individual offer (only for your organisation) or an offer (e.g. workshop) for several of MISEREOR's partner organisations?	You can participate actively in designing individual offers for your organisation. Where the offers are for several partner organisations, the possibility of such participation is limited.
Individual offers: What are the objectives and contents of the consulting services? What is the time schedule?	In the dialogue, clearly state what your expectations are, especially in your contributions to the Terms of Reference ² for consulting services.
Who is to implement the consulting services?	If necessary, make known your opinion of MISEREOR's proposal.
Implementing the consulting services	
Individual offers: Are events unfolding in line with your expectations? Do you think the consulting steps are useful in view of the objectives listed in the Terms of Reference?	Report back to the consultant if your expectations are not being met. Take an active role in shaping the consulting services by discussing expectations and also by raising questions and restrictions with the consultant. Decide on the procedure together.
Does it look like the consulting objectives will be met as planned?	If not, inform the consultant and MISEREOR. We should then together consider how the consulting services can be modified.
Conclusion and exit from consulting services	
How are the results of the consulting services documented?	At the end of the consulting assignment at the latest, the consultant produces a report documenting the important stages in the process and the results achieved through the services provided. If necessary, make suggestions for changes to the report.
Is it clear how things will proceed after the consulting assignment is finished?	Raise this question in the final consulting steps. Clarify with the consultant how you yourself can contribute after the consulting assignment is complete to ensure that the desired change is durable. If necessary, a meeting to reflect on the changes that were introduced can be arranged with the consultant or with MISEREOR a few months later.
How useful were the consulting services? How satisfied are you with the process?	Give MISEREOR and, if appropriate, the consultant feedback on this. Present the results of the consulting services and the changes achieved in your narrative reports to MISEREOR.

² You will find a specimen structure for the Terms of Reference on page 11 onwards.

3. Checklist for partners who themselves commission consulting services and receive funding for this from MISEREOR

Questions	Options for action
Clarification of the assignment	
On what subject would you like to be advised? What questions or problems are to be addressed?	Formulate answers to these questions as accurately as possible in the Terms of Reference ³ .
What changes are to be achieved through the consulting services?	
What is necessary in order for this to take place? A single consulting visit? A training module tailored to your organisation? A consulting process?	
What would be a reasonable time frame?	
Who is to implement the consulting services? What expertise should this person have?	Look carefully for a consultant after you have clarified the questions above. Conduct preliminary talks with several persons if necessary and then choose one of these.
What exactly is the consultant required to do?	Conclude an agreement with the consultant complete with Terms of Reference. The contract should include information on the planned scope of the assignment (number of consultant days), the fees and reporting requirements. ⁴
Implementing the consulting services	
Are events unfolding in line with your expectations? Do you think the consulting steps are useful in view of the objectives listed in the Terms of Reference?	Report back to the consultant if your expectations are not being met. Take an active role in shaping the consulting services by discussing expectations and also by raising questions and restrictions with the consultant. Decide on the procedure together.
Does it look like the consulting objectives will be met as planned?	If not, inform the consultant. You should then consider together how the consulting services can be changed or whether the consulting objective will have to be further developed.
Conclusion and exit from consulting services	
How are the results of the consulting services documented?	At the end of the consulting assignment at the latest, the consultant produces a report documenting the important stages in the process and the results achieved. Include any suggestions for changes in the report and, in your role as commissioning party, accept the report if you are satisfied with it. The assignment should not be considered complete until this status has been established.

³ You will find a specimen structure for the Terms of Reference from page 11 onwards.

⁴ You will find a specimen agreement for consulting services starting on page 13.

Questions	Options for action
Is it clear how things will proceed after the consulting assignment is finished?	Raise this question in the concluding consulting steps. Clarify with the consultant how you yourself can contribute after the consulting assignment is complete in order for the desired change to be durable. Also, a follow-up reflection with the consultant or with MISEREOR on the changes that were introduced can take place a few months later.
How useful were the consulting services? How satisfied are you with the process?	Give feedback on this to the consultant and possibly to MISEREOR as well. In your narrative reports for MISEREOR, describe the results of the consulting services and the changes that were achieved.

4. Specimen structure for the Terms of Reference for consulting assignments

The Terms of Reference (ToRs) set out what is to be achieved through the consulting services. They are agreed with all parties involved in the consulting assignment. In order to ensure that the consulting services fulfil the expectations of all stakeholders, the ToRs must be formulated as clearly and precisely as possible. The following information and explanations may be of help in this task.

0. Introduction

This section should include a brief description of the organisation or work unit that is to be advised and also explain how the decision to provide consulting services was arrived at.

- When was the organisation created? What are its key areas of work and to what changes does it wish to contribute?
- What led those involved to consider consulting services as an option? What factors provided the impetus to commence with the consulting services?
- What is the subject of observation? Are we looking at the organisation as a whole? Are we focusing on individual projects, strategies or work units?

1. The objectives of the consulting services

In order for consulting services to lead to the desired changes they must be described as precisely as possible. Consulting services can have several objectives – however, if there are too many they will be more difficult to plan and steer successfully. For this reason, you should define no more than two or three objectives, and it is important to ensure these can be achieved in combination.

- What specific changes are to be achieved through the consulting services?

2. Key themes or questions to be addressed in the consulting services

Based on the above objectives, the next step is to describe the point of intervention of the consulting services. For example, this could be to

- improve the monitoring system
- introduce a communications strategy
- develop new strategies for lobbying and advocacy work
- strengthen expertise in order to meet the following new challenges: ...

It might also be helpful to formulate specific questions, for example:

- How can our project target groups be more closely involved in planning and steering?
- What strategies do we need in order to tap new sources of finance?
- How can we react to the impacts of climate change through our work?

These are all examples of different consulting options, and they should not be adopted one-to-one. Objectives and questions must be individually formulated for each consulting package in line with the specific situation in the organisation being advised.

3. Expected results of consulting services

In this section you can formulate specific results that are to be achieved by the end of the consulting assignment, for example:

- A strategy for dealing with XY has been developed and translated into concrete plans.
- An outcome and impact monitoring system has been introduced.
- The accounting system has been adapted to the requirements that apply to project financing provided by MISEREOR.
- Supervisory bodies have been established and trained in carrying out their role; corresponding task descriptions have been developed for these bodies.

4. Methodology and organisation

This section focuses on practical questions relating to the consulting services, for example:

- Who (e.g. which groups of staff, which other stakeholders) must be involved in the consulting services? Which persons are absolutely essential?
- Are workshops important? How are participants given the opportunity to raise confidential matters should this be necessary?
- Should people outside the organisation be included? Would an exchange with other organisations be helpful?
- What documents do the consultants need in advance?
- What are the timelines?
- What competencies are the consultants expected to have?

5. Report

It is important to properly document the provision of consulting services; this should be one of the tasks of the consultant.

In this section, it is therefore important to set out the following points as a minimum:

- Who is to produce the report and when?
- Who is the report for? Is it only for persons who were themselves involved in the consulting assignment or is it for the whole organisation? Is MISEREOR also an addressee?
(Important with regard to confidentiality)
- What are the minimum contents of the report (Summary? Process description or only results? Documentation of individual steps, e.g. workshops?)?
- How many pages should the report have?

5. Specimen Agreement with Consultants

This specimen Agreement is a proposal for partner organisations that do not have their own contract formats. It is broadly similar to the agreements that MISEREOR enters into with consultants. It should be adapted to the specific context.

The

commissioning organisation

with address

- Commissioning party -

and

Consultant

with address

- Consultant -

hereby agree the following:

I. Object of the assignment

The Commissioning Party awards the Consultant the contract to carry out the following consulting services: [redacted] (more detailed information, see ToRs Annex 1))

II. Implementation of the assignment

(1) The Consultant commences his/her work activity with the start of the preparations for the consulting services. The consulting assignment will last up to [redacted] days, of which [redacted] days are planned for the preparation of the assignment, [redacted] days for consulting activities at/for the Commissioning Party and [redacted] days for the follow-up work (incl. reporting/assessment). The Consultant shall agree the dates for the provision of consulting services with the Commissioning Party.

(2) The Consultant shall produce a report at the end of the assignment, at the latest when the consulting objectives are achieved (for more details see Annex 1). The report shall be written in (language) .

The report shall be submitted to the Commissioning Party by Day Month Year; if requested the Consultant shall produce a revised version after the Commissioning Party has submitted its comments on the text first submitted.

III. Duration of the Agreement

(1) This contractual relationship ends with the acceptance by the Commissioning Party of the report mentioned in Section II.2 above.

IV. Fee and reimbursement of costs

- (1) Fee: For the preparation, the provision of consulting services and the report, the Commissioning Party pays the Consultant
a daily fee of [currency] [] (in words [] [currency]) or
a lump-sum fee ¹ of [currency] [] (in words [] [currency])
following submission of the corresponding invoice(s).
- (2) For necessary overnight stays, the Commissioning Party pays daily and overnight accommodation allowances to the amount of [] (daily allowance) and [] (overnight accommodation allowance). If overnight accommodation or meals are provided free of charge, no daily allowances or overnight accommodation allowances will be paid.
- (3) In addition, all necessary transport and travel expenses will be reimbursed upon presentation of receipts up to the amount of []. Other necessary expenditures (visa fees, preventive travel medicines, communication costs, costs of materials and copying) are reimbursed [] upon presentation of receipts (except for the costs of the Consultant's insurance policies). **In exceptional circumstances**, ancillary costs may also be reimbursed as a lump-sum payment.
- (4) Upon request, the Commissioning Party grants an advance payment of up to [] for travel expenses and fees. The remaining amount is paid after the end of the assignment as per account rendered.
- (5) Notices of termination of any kind shall be made in writing. If important reasons exist, the contractual relationship can be terminated without notice (extraordinary termination).
- (6) If the report, either as a whole or in part, is submitted late due to reasons for which the Consultant is responsible, the Commissioning Party can stipulate an appropriate date for delivery. If the Consultant fails to deliver the report by this new date, the fees shall be reduced initially by 10% and then by a further 10% with the second reminder.
- (7) The final invoice shall be submitted after completion of the assignment.
- (8) The Consultant is liable for the payment of all taxes and charges arising in connection with this Agreement.

V. Insurance

- (1) The Consultant confirms that there are no health concerns with regard to a possible field visit.
- (2) The Consultant is responsible for arranging and paying for insurance according to his/her needs, in particular to cover risks to life and health.
- (3) **The Commissioning Party shall not be liable for any damages incurred by the Consultant that arise due to a failure to observe the foregoing provisions.**

¹ A lump-sum fee can include daily and overnight accommodation allowances; this information must be documented.

VI. Dissemination of information

- (1) The Consultant undertakes to keep secret any information that becomes known to him/her in connection with the implementation of this Agreement and shall not disclose any related information without obtaining the prior approval of the Commissioning Party.
- (2) The Consultant undertakes to observe the confidentiality of the data collected. This means that the Consultant shall collect, process or use only those personal data that are necessary in order to complete the assignment.

VII. Final provisions

- (1) Amendments and supplements to this Agreement shall not be valid unless they are made in writing.
- (2) The parties to this Agreement undertake not to offer – either directly or indirectly – advantages of any kind to third parties, nor to accept – either directly or indirectly – any financial rewards or gifts either for himself/herself or for others, nor to procure or agree to accept other advantages that are or could be deemed to be unlawful practice or bribery. Violations or non-observance of this clause will lead to claims for repayment.
- (3) If any of the provisions of this Agreement become invalid, this shall not affect the validity of the other provisions.

.....,

Location of Commissioning Party Date

.....,

Location of Consultant Date

.....

For the Commissioning Party

.....

The Consultant

Annex 1: Terms of Reference (ToRs)

Part 2: Why and how does MISEREOR support its project partners through consulting services? – Basic considerations

1. What does MISEREOR understand by "consulting services for partners"?

At MISEREOR, the term "consulting services" covers various forms of support provided to partners *by external personnel against payment*. We generally use the term "dialogue" for advisory support provided by MISEREOR staff, and neither dialogue nor exchanges between partner organisations (which can take on a consulting function) are dealt with in these guidelines.

Consulting services as a triangular relationship

In most cases, cooperation on consulting services involves two actors - the provider and the recipient. In development cooperation, the donor⁵ also plays a role in many cases:

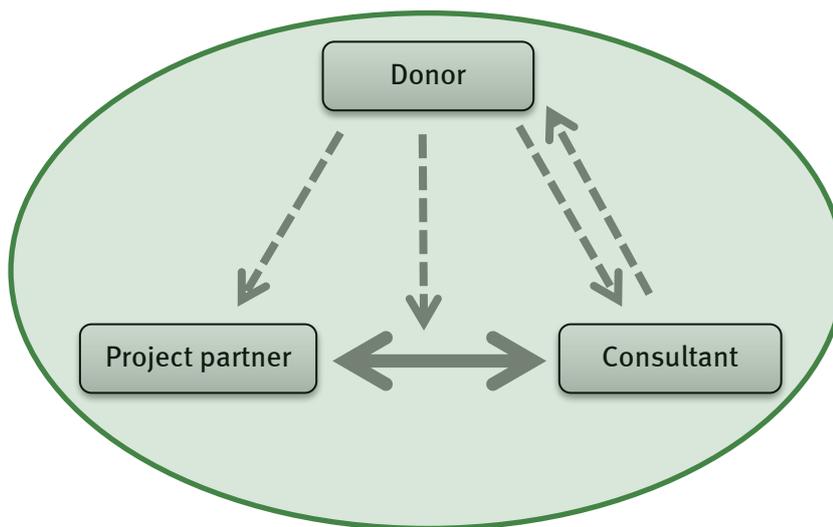


Diagram 1: Consulting services in development cooperation

The impetus for a consulting process can come from the donor. If the donor commissions the consulting services, it influences the contractual conditions and thus the content of the consulting services. There may be an exchange between the donor and the consultant in which the partner organisation receiving advice is not involved.

⁵ MISEREOR considers itself to be not only a donor but also a partner among equals: an organisation that pursues goals together with others and that also receives support, ideas, knowledge from these other actors while at the same time passing on financial and nonfinancial support. In practice, however, MISEREOR is also a donor, and this role is relevant in the consulting context.

All three actors articulate their own interests and viewpoints in the consulting process, but they do this from different positions of power. When MISEREOR makes a proposal for consulting services to a project partner, it is not always clear whether this is an offer made in a spirit of partnership or a condition (obligatory) of the donor. When a project partner agrees to accept consulting services, it is not always clear whether it desires a corresponding change, or whether it feels pressured by MISEREOR to take a certain course of which it is not convinced. And the person who undertakes the consulting assignment does not always know to whom he/she should feel responsible.

These guidelines make clear that consulting services can be governed by different objectives and interests. They are therefore intended to help all three actors – project partners, consultants and MISEREOR – to clarify in advance and during the process what the specific content and objectives of the consulting services are and who actually steers them.

2. The functions of consulting services

The consulting services that MISEREOR offers or supports financially can serve various purposes. Basically, MISEREOR differentiates between three types: delegated partner dialogue, training, and consulting services in the narrower sense.

a. Delegated partner dialogue

In view of the large number of projects and the variety of themes and questions that play a role in our joint work, the time available to MISEREOR staff for the dialogue with partners is limited. Under the general heading "consulting services", we therefore also outsource some dialogue functions e.g. when a more in-depth treatment of specialist subjects is called for.

Here, the "consultants" take over elements of the partner dialogue on behalf of MISEREOR; the objectives and content are specified by MISEREOR. In this kind of "consulting", MISEREOR plays an active role in shaping the process, and it clarifies the assignment with the consultants.

Example: *One of MISEREOR's continental departments recognises that the extraction of raw materials in the region receiving support is becoming more important and affecting the ability of disadvantaged population groups to shape developments. MISEREOR has not yet discussed this topic in depth with its partner organisations, and the regional desk officer responsible is not confident of his/her abilities in this field.*

A consultant is therefore engaged to examine to what extent existing or prospective partner organisations are working on this theme, how their strategies can be further developed to enable them to cope with requirements in this thematic area, and what expectations they have with regard to cooperation with MISEREOR in this field.

To do this, the consultant travels once or several times to the region and engages in a corresponding dialogue with project partners or organisations that have not previously been in contact with MISEREOR. The consultant naturally contributes his/her expertise to the dialogue and brings the lessons learned and possibly proposals for cooperation from this dialogue back to MISEREOR.

Such delegated partner dialogues present opportunities, but there are also risks. Opportunities include:

- The partners and MISEREOR feel better informed.
- The partners better understand MISEREOR's strategies, processes and expectations.
- MISEREOR gains a better understanding of the partners' strategies and takes these into account when providing project support.
- The partners and MISEREOR jointly develop solutions to new challenges and strengthen cooperation in this area.

One risk that MISEREOR sees is that partner organisations may feel pressured to change the way they work without themselves being convinced that this is necessary. It is important that MISEREOR clearly communicates the objectives of the consulting services and the role of the consultant.

b. Training

In order to be able to obtain funding from MISEREOR or from the German Catholic Central Agency for Development Aid (KZE)⁶, partner organisations must meet certain standards. This applies above all to the financial and administrative aspects of project cooperation, but also to the focus on effects in the project application and reporting. If partner organisations are not familiar with these standards and concepts, MISEREOR is interested in giving them the opportunity to acquire the relevant know-how. This generally takes place under the heading "consulting services".

Example: MISEREOR's emphasis on effects has had an impact on planning and reporting standards. Partner organisations are now expected a) to focus on effects when planning their work, b) to systematically monitor effects and c) to report on these such that it is possible to assess (in concrete terms) the likelihood of achieving objectives. A consultant receives a three-year contract in order to train the partners in a region in workshops and to advise them on the further development of their PME systems (Planning, Monitoring and Evaluation).

In some areas MISEREOR also expects project partners to use certain content-related or specialist concepts that it believes are essential for ensuring the quality and sustainability of their work.

Example: Conflict-sensitive work

Many of MISEREOR's partners work in conflict-affected environments. In such contexts, project work can inadvertently exacerbate existing conflicts between various groups or even trigger new disputes. This applies not only to project work but also to other activities, e.g. lobbying and advocacy work. MISEREOR therefore offers consulting services and training on conflict-sensitive methods (e.g. the do-no-harm approach).

Here too, MISEREOR sets the consulting objectives and content; dialogue and training are often combined.

MISEREOR also offers training to its project partners that goes beyond the minimum standards of cooperation. In many cases, the themes emerge from the dialogue between MISEREOR and its partners: the challenges encountered while working in a region and on a particular theme are

⁶ MISEREOR receives funding from the German Federal Ministry for Economic Cooperation and Development via the German Catholic Central Agency for Development Aid (KZE) and uses this to support projects.

discussed, and from this emerges the idea that an offer to broaden knowledge, expand expertise and reflect on possible solutions might be helpful. In this way training offerings are created, not only in the form of workshops but also as more in-depth consulting services on specific themes, possibly in a one-to-one format.

MISEREOR should always inform project partners clearly a) when training or consulting services are obligatory because they relate to minimum standards of cooperation, or b) when project partners are provided with suggestions and offers that they can accept but are not obliged to.

c. Consulting services in the narrower sense

Normally, consulting services are an open process aimed at developing the proactive management capability and decision-making competence of individuals, groups or organisations. This process is geared to the needs of those seeking advice, and this same group steers the process together with those providing advice, i.e. the consultants. This type of consulting support is of course also included in the range of services MISEREOR offers. Here, the interest in further developing expertise or organisational capability originates from the partner organisation, or it emerges in the dialogue between MISEREOR and the partner organisation. In this way, MISEREOR wants to open up opportunities that enhance the effectiveness of local development processes and the proactive management capability of local actors. Financial resources are made available for the consulting processes, and if needed contact is established with suitable consultants.

Example: *In the framework of an evaluation, a partner organisation is advised to develop its strategies in view of the increasing likelihood of conflict in the area. The strategy development process is facilitated by a consultant who is also an expert in civil conflict transformation. The aim is to develop a coherent strategy in line with the convictions and capabilities of the organisation – independently of the views of the donor, MISEREOR.*

Setting the priorities of such consulting services should essentially be the responsibility of the partner organisation being advised, and the process is shaped by the partner organisation and the consultants. In these cases, MISEREOR does not play a role in shaping content but is involved as donor and contractual partner.

d. Mixed forms

In most cases, the above-mentioned scenarios are not a perfect fit and cannot be applied one to one.

- Whenever somebody interacts with a partner organisation on behalf of MISEREOR, dialogue elements will be expected of him/her: the partner organisation, which may have little direct dialogue with MISEREOR, expects to receive information about MISEREOR from this person; MISEREOR hopes to get detailed information on the partner and the project, and in many cases the consultant would like to contribute to the dialogue and interaction between the other two actors.
- Often, consulting services in the narrower sense also include training elements.
- As a result of dialogue and (obligatory) training, the recipient organisation may wish for additional in-depth advice, thus changing the interaction between consultant and partner organisation from the provision of (externally determined) content to a more open search for useful courses of action.

This mix or further development of consulting functions is in itself no problem. On the contrary, it can be a sign of flexibility and show that the needs of the parties involved are taken seriously. However, the predominant function must be clearly stated, because various consultant roles are associated with the different functions. If it is not clear what these roles are, there is less chance of achieving the "consulting" objectives.

3. What kind of consulting services are offered?

MISEREOR offers its project partners consulting support in various ways. "MISEREOR consultants" enter into a direct cooperation arrangement with MISEREOR for a particular time frame and on this basis advise several project partners – mostly on one specific theme. Independent freelance consultants offer their services on the market and are commissioned either by MISEREOR or by a partner organisation to undertake individual consulting processes.

MISEREOR consultants include:

- a) **Development workers** from Germany who are based at *one* partner organisation in the South, generally for three years, but who advise several of MISEREOR's partner organisations from that location.⁷ From MISEREOR's point of view, the advantage of this form of service provision is that the consultant is more familiar with MISEREOR and can better communicate MISEREOR's interests and requirements.⁸
- b) **Short-term consultants**, whose usual place of residence is in the EU and who travel from there to the South in general at least four times a year to advise several of MISEREOR's partner organisations on a specific theme. Between their journeys they also remain in contact with the recipients of the consulting services in the partner countries. On behalf of MISEREOR, AGEH enters into a fixed-term contract with the short-term consultant, generally for three years. Short-term consultants often advise the same partner organisations for longer periods (3-6 years). Like experts, short-term consultants are well suited to undertaking assignments in which they are required to communicate "donor logics" over a longer period. They can also enter into in-depth thematic dialogue with partners and channel the knowledge acquired into internal discussions at MISEREOR.
- c) **Consulting organisations in the South**, who on the basis of project contracts with MISEREOR are commissioned to advise other partner organisations in their country or region. They perform this task either with their own employees or they enter into contracts with local freelance consultants on a fee basis. Special features of this kind of advice are that it simplifies the "transfers" from the donor culture to the local culture, and it enables the partners' views to be more easily transported back to MISEREOR.

⁷ The more frequent case, in which seconded experts are active only at and for their host organisation, is not considered here as this does not fit the definition of *external* consulting services. This option is, however, still available. For their work in the South, development workers enter into contracts with the Association for Development Cooperation (AGEH).

⁸ MISEREOR Dialogue and Partnership Services, which operate in some countries and undertake diverse dialogue tasks for MISEREOR, are a special case.

Consulting services are provided through **independent consultants** in the following ways:

- d) In some countries, a partner organisation manages a **consulting fund** from which other partner organisations can obtain financing for consulting services. In contrast to c) the local partner organisation does not provide (or design) the consulting services, only the financing.
- e) In justified cases, project partners can apply for **project funds** for external consulting services when submitting the project application. If approved, the partners can use the funds to enter into a contract with an external consultant themselves.
- f) In other cases MISEREOR itself undertakes to find a suitable person to advise the partner organisation. The consultant enters into a **consulting agreement with MISEREOR** for the specific assignment. In these cases the content of the assignment (ToRs) is drawn up in close consultation between MISEREOR, the consultant and the partner organisation as recipient; MISEREOR provides the financing.

What type of consulting service is preferred for which purpose?

Independent consultants (in particular types d) and e)) should not be used for assignments in which the focus is on dialogue or obligatory partner training. Conversely, independent consultants (types d) - f)) are clearly preferable to MISEREOR consultants (types a) - c)) for consulting services in the narrower sense.

4. Information for consultants commissioned to provide consulting services to MISEREOR's partners

- The different functions described from page 17 onwards require consultants to adopt different roles. To ensure the success of the consulting process, it is important to clarify with all parties whether the aim is to intensify dialogue, to transfer expertise or to support the client in developing its own strategies and solutions.
- Consulting services (and training) can be obligatory or voluntary in nature. This distinction is the basis for determining who defines the content of the consulting services. Here too, it is important to clarify the situation with all parties.
- Consultants who conduct partner dialogues on behalf of MISEREOR or who bring partners up to date on MISEREOR's requirements and the associated competencies, must be very familiar with MISEREOR and kept informed of current developments. These consultants therefore need intensive continuous accompaniment support from MISEREOR.
- “MISEREOR consultants” are accountable to MISEREOR. It is therefore essential that they provide excellent documentation of the consulting services delivered, including details of the time spent advising individual partners.