

Graduation Approach White Paper & Roadmap Scope of Work

Consultancy Title	Graduation Approach White Paper & Roadmap
RFP Number	US7269.9.4
Location	Remote
Contract Duration and LOE	September 27, 2023 – December 15, 2023
Due date for clarifying questions	Friday, September 15, 2023 11:59 PM EST
Due date for full proposal	Wednesday, September 20, 2023 11:59 PM EST
Contact Person	Global Supply Chain Management GSCMConsultancies@crs.org Bryan A. James Bryan.James@crs.org

I. Application Requirements

Applicants must submit the following:

1. Cover letter, which describes a brief summary of approach that demonstrates qualifications in undertaking the Scope of Work. This summary should highlight how the applicant will complete the deliverables. (Document cannot exceed 3 pages single-spaced.)
2. Compensation rate per day, number of billable days anticipated, and total compensation.
3. Resume/ CV.
4. Contact Information for three professional references, with the following details about the references: (a) name, (b) position, (c) company, (d) phone number, (e) email address, and (f) city, state, country

II. Background

The graduation approach is designed to support households living in extreme poverty to rise above the poverty line and find sustainable ways to engage in markets to meet their basic needs. Originally introduced by the [Bangladesh Rural Advancement Committee \(BRAC\)](#), the approach has been widely adopted and adapted by other organizations and studied with compelling evidence of effectiveness ([Banerjee et al., 2015](#)).

The graduation approach is built on five core elements: targeting, consumption smoothing support, savings, skills training and regular coaching, and an asset transfer. Implementers tend to adapt the building blocks—prioritizing, sequencing, and shaping the elements to the priority needs of the poorest and the reality of the markets in the various program sites. Understanding the core logic of the model and knowing how and when to bring in flexibility is a key role of the implementer—especially the program staff charged with the close monitoring and coaching of participants (CGAP).

Donors and governments increasingly recognize the value of the graduation approach. For example, several

Bureau of Humanitarian Affairs (BHA) Resilience Food Security Activities (RFSAs) have implemented the graduation approach to reduce food insecurity. Despite the approach's promise, it can be challenging and costly to implement, particularly if clients are distributed across wide geographies or if the intended outcome is to improve child-level outcomes ([TOPS, 2022](#)).

To date, Catholic Relief Services (CRS) has limited experience designing and implementing the graduation approach. While many of CRS' interventions with households and communities, include sequencing and layering of asset transfers, savings, financial education, and business skills training as well as case management that make up the core components of the graduation approach, CRS does not have its own well-formulated, standard graduation approach and has relied on partnerships for this expertise. The tenets of the model align well with CRS' objectives in livelihoods and food security programming as well as holistic family strengthening programming to improve child well-being and social protection. Furthermore, there is potential for the model to support other areas of the agency's work such as climate resiliency and inclusion. Where CRS engages government systems there are often opportunities to draw from the experience and evidence of the graduation approach to influence policy and strengthen systems to improve outcomes for people who are vulnerable – at scale.

III. Purpose

Based on the background outlined above, CRS would like to engage a consultant to develop a white paper on the [graduation approach](#) to addressing extreme poverty. The document will include:

1. A description of the core elements topline graduation approaches.
2. A summary of the evidence and evidence gaps for the approach, particularly as it relates to improvement in family strengthening and child-level outcomes, inclusion (especially for people with disabilities and indigenous groups), climate resilience, integration into national social protection programs and opportunities to scale the approach.
3. A summary of CRS' use of the graduation approach/graduation-like approaches including strategic partnerships across its programming.
4. A roadmap for the development of a comprehensive CRS graduation approach package that builds on our experience/skills to date, is relevant to our partnership models and programming principles.
5. A strategy to build awareness and buy-in at the agency leadership level, develop staff capacity to understand, design and implement the approach and support advocacy objectives.

IV. Specific Tasks and Activities

The following tasks and activities are required by the consultant:

1. Meet with CRS staff for an overview of assignment, programming, partnership models and organizational priorities.
2. Develop a workplan.
3. Conduct a desk review of topline graduation programs including key features of the various models.
4. Conduct a desk review of the evidence (and gaps) related to the graduation approach, with a focus on poverty reduction, food security, family strengthening and child-wellbeing, climate change, and inclusion.
5. Review existing tools curricula (SILC, COFE, etc.), program design, notes from key informant interviews and reports of previous CRS' graduation/graduation-like programming.
 - Ethiopia
 - Kenya
 - Uganda (Nuyok)
 - Malawi
 - Nigeria

- Global Orphan and Vulnerable Children and Care Reform Projects using case management. Conduct additional key informant interviews as needed.
6. Develop an outline for part 1 of the white paper.
 7. Draft part 1 of the white paper summarizing findings of the desk reviews and review of CRS experience to date.
 8. Convene a group of key stakeholders to present findings to date and recommendations for the development of a CRS-specific graduation approach.
 9. Facilitate a remote session with key stakeholders to gather inputs for roadmap development.
 10. Develop an outline of Part 2 of the white paper.
 11. Draft part 2 of the white paper including a roadmap and awareness and buy-in strategy.
 12. Finalize the complete white paper.
 13. Present a summary of findings to CRS.

V. Activities and Deliverables

The following deliverables are required by the consultant:

1. Outline of part 1 of the white paper: includes a review of the graduation models¹, existing evidence and gaps, summary of CRS experience and tools.
2. Draft of part 1 of the white paper.
3. Outline of part 2 of the white paper: includes roadmap and strategy.
4. Draft part 2 of the white paper.
5. Final white paper.
6. Presentation of findings, roadmap, and strategy recommendations.

VI. Period of Performance and Deliverable Due Dates

	Activity	Deliverable	Est. days	Due Dates
1.	Inception meeting Workplan	1. Workplan	1 day	September 13, 2023
2.	Desk reviews of graduation approaches and evidence CRS material review Key informant interviews (as needed) White paper part 1 outline Draft white paper part 1 and receive feedback	2. Part 1 outline 3. Draft white paper Part 1	14 days	September 30, 2023
3.	Convening to discuss recommendations for CRS graduation approach White paper part 2 outline and receive feedback	4. Part 2 outline 5. Draft white paper Part 2	10 days	October 15, 2023

¹ This includes, but is not limited to: Training materials and approaches; Staffing; Implementation and duration; Operational environment e.g., rural/urban; Distinguishing features; Cost per participants; Graduation rates; Opportunities for disability inclusion, climate resilience and child well-being/family strengthening; Impacts (positive/negative) on gender dynamics and children; Sustainability & integration with government social protection; MEAL systems; Strengths/weaknesses of each model; Evidence of effectiveness.

	Draft white paper and receive feedback			
5.	Final white paper Presentation	6. Final white paper (parts 1&2) 7. Presentation	5 days	November 15, 2023

VII. Qualifications

The consultant is expected to hold the following qualifications in order to be eligible for this position:

1. PhD or Master’s degree in economics, international development, social work, sociology or another related discipline.
2. At least 10 years of experience in food security programming, social services and social protection work at the implementer level and in governments with at least five years specifically with the graduation approach.
3. Demonstrated ability to synthesize feedback from multiple sources.
4. Excellent synthesis and writing skills.
5. Experience using file management tools such as Dropbox or Teams.
6. Demonstrated ability to meet deadlines.

VIII. Proposal Deadline

All proposals must be received by gscmconsultancies@crs.org with a **copy** to bryan.james@crs.org no later than Wednesday, September 20, 2023 [11:59 PM EST for electronic submission]. The solicitation name **“US:7269.9.4 Graduation Approach White Paper & Roadmap”** must be included in the subject line.

IX. Q&A Opportunity

Prospective bidders may submit any clarification questions to gscmconsultancies@crs.org with a **copy** to bryan.james@crs.org by Friday, September 15, 2023. Responses will be provided to any known prospective bidders by Monday, September 18, 2023. The solicitation name **“US6831.06.06 Documentation of Know Your Child Model”** must be included in the subject line.