Terms of Reference
SUSTAIN, Strategic & Financial Planning Advisory

1. Background

Launched in 2004, Alfanar is the Arab region's first venture philanthropy organisation. Alfanar is a UK-based charity with operations in Egypt, Lebanon, Jordan and Palestine that aims to transform the lives of disadvantaged children, youth and women across the Arab world by funding and strengthening ambitious social enterprises responding to pressing needs, especially in education, youth employment and women's economic empowerment.

Through its SUSTAIN track (Growth Stage), Alfanar provides intensive, long-term support to a core group of 4 social enterprises in Jordan, across a range of areas critical to their growth. To build on this support, Alfanar is engaging two separate consultants to deliver a dedicated strategic planning engagement for the SUSTAIN enterprises across two complementary roles: a **Strategic Planning Consultant** (Activities & Impact) for 4 SUSTAIN Social Enterprises (SEs) and a **Financial Planning & Modelling Consultant** for 4 SUSTAIN and 4 SEED (Early Growth Stage) Social Enterprises.

This Term of Reference covers both roles. Each role is contracted independently, and applicants may apply for one role or both. Applicants should indicate clearly which role(s) they are applying for. A single bidder may be awarded both roles where it evidences the required capability in each; where a bidder applies for both, each role must be priced separately so that they can be evaluated and awarded independently.

2. Objective

To strengthen the strategic direction and scale readiness of Alfanar's SUSTAIN & SEED social enterprises by delivering strategic planning support across both the activities/impact and financial dimensions, resulting in clearer strategic choices and practical, prioritised next steps for each enterprise.

3. Scope of Work

The consultant will deliver the following components:

Role 1- Strategic Planning Consultant (Activities & Impact) (4 SUSTAIN SEs)

- Strategic planning work with the SUSTAIN enterprises on their growth, activities and impact: facilitating each enterprise through its strategic direction, priorities, impact model, and the decisions required to act on them, with advisory guidance grounded in the consultant's sector and growth experience.
- Preparation and reporting to consolidate findings, recommendations, and prioritised next steps per enterprise into a single report to Alfanar.

Role 2- Financial Planning & Modelling Consultant (4 SUSTAIN SEs and 4 SEED SEs)

- Financial planning and modelling work with the SUSTAIN enterprises: financial direction, financial models and projections, pricing and unit economics, sustainability, and the financial decisions and assumptions underpinning each enterprise's strategy.
- Dedicated finance mentoring for the enterprises, delivered as hands-on support to founders and their teams on financial modelling, cash-flow, and financial readiness.
- Preparation and reporting to consolidate findings, recommendations, and prioritised next steps per enterprise into a single report to Alfanar.

4. Deliverables and Timeline

The assignment must be fully completed and all deliverables submitted by the 15th of September 2026 at the latest. Delivery will be scheduled around the availability of the participating enterprises within this deadline.

Each consultant will phase delivery against the following milestones, which the bidder should reflect in its work plan:

Strategic Planning Consultant (Activities & Impact): (Up to 10 days)

#	Deliverable	Format	Timeline
1	Inception note & agreed workplan	Written Report	Within one (1) week of contract signature
2	Group training on Strategic planning, activities & impact, delivered	Facilitated sessions + outputs	By 27. August. 2026
3	1:1 session delivery for SUSTAIN SEs	Facilitated sessions + outputs	By 10. September. 2026
4	Prioritized recommendations and next steps per enterprise	Written	By 15. September. 2026
5	Final consolidated report	Written report to Alfanar	By 17. September. 2026

Financial Planning & Modelling Consultant: (Up to 14 Days)

#	Deliverable	Format	Timeline
1	Inception note & agreed workplan	Written Report	Within one (1) week of contract signature
2	Financial planning & modelling engagement, delivered	Facilitated sessions + models/outputs	By 27. August. 2026
3	1:1 session delivery for SUSTAIN SEs	Facilitated sessions + outputs	By 10. September. 2026
4	Finance 1:1 mentoring for SEED enterprises, delivered	Facilitated sessions + outputs	By 6. September. 2026
5	Prioritised recommendations and next steps per enterprise	Written	By 15. September. 2026
6	Final consolidated report	Written report to Alfanar	By 17. September. 2026

7. Fee

The consultant is requested to submit a financial proposal as a lump sum inclusive of all professional fees and preparation time. Costs associated with the group day venue and logistics will be covered separately by Alfanar. Payment will be made against agreed deliverables and in line with Alfanar's standard contracting and financial procedures.

- 30% on signature of the contract and Alfanar's approval of the inception note and work plan;
- 70% on Alfanar's acceptance of all per-enterprise sessions for the relevant role and the acceptance of the final consolidated report.

Payment will be made within thirty (30) days of receipt of a valid invoice and Alfanar's written acceptance of the associated deliverables.

In addition to the lump sum, the financial proposal must state the daily professional fee rate on which it is based, so that the fee can be adjusted if the contracted level of effort changes. Bidders applying for both roles must submit a separate lump sum and day rate for each role and may not present a combined price only. Currency, tax treatment, and the payment schedule are set out in Annex A, Section A.4.

8. Required Qualifications

Strategic Planning Consultant (Activities & Impact):

- Senior-level experience in strategy, business growth, and scaling with SMEs or social enterprises.

- Demonstrated experience facilitating strategic planning and impact processes with founders and management teams.

Financial Planning & Modelling Consultant:

- Senior-level experience in financial planning, financial modelling, and financial sustainability for SMEs or social enterprises.
- Strong command of financial models, projections, pricing, and unit economics, with the ability to build and transfer usable financial tools.
- Demonstrated experience mentoring early-stage founders on financial readiness, given the SEED finance mentoring component of this role.

Common to both roles:

- Strong track record of practical advisory work that leads to decisions and action, not analysis alone.
- Experience in the Jordanian and/or wider MENA market.
- Full working proficiency in Arabic and English.

9. Reporting

The consultant will report to the Co-Director at Alfanar Venture Philanthropy Jordan, who will approve all deliverables.

Both roles operate alongside one another and alongside the consultants engaged under the SEED Business Validation and Marketing & Branding Terms of Reference. Each consultant is required to take part in a joint inception call and to coordinate through Alfanar to avoid duplicated diagnostic work with the same enterprises.

10. How to Apply

Interested consultants are invited to submit the following:

- A technical proposal outlining the proposed approach and delivery schedule.
- A financial proposal covering the full scope of work.
- CV and evidence of comparable assignments delivered.

Submission details can be found in the annex.

Annex A — Submission, Evaluation and Contracting Terms

This Annex forms a part of these Terms of Reference and applies to all bidders. By submitting a proposal, the bidder accepts the terms set out below.

A.1 Submission requirements

Proposals must comprise the following, submitted as separate PDF files:

- Technical proposal (maximum 5 pages), covering the proposed approach and methodology, work plan and delivery schedule, and evidence of comparable assignments.

- Financial proposal, submitted as a separate file, in the format required in the Fee section of these Terms of Reference.
- CV(s) of the proposed consultant or team, including the role and level of effort of each named individual.
- Two client references for comparable assignments completed within the last three years.

Submissions must be sent by email to applications@alfanar.org.uk with the assignment title in the subject line.

Submission deadline: 3rd of August 2026, 17:00 Amman time. Proposals received after this time will not be considered. Alfanar will acknowledge receipt of each submission by email; it is the bidder's responsibility to confirm receipt.
Note: Please note that proposals will be reviewed on a rolling basis. We recommend submitting your proposal as early as possible.
Proposals must remain valid for thirty (30) days from the submission deadline.

A.2 Evaluation criteria

Proposals will be assessed on a combined technical and financial basis, weighted 70% technical and 30% financial.
Financial proposals will be opened only for bidders scoring a minimum of 70 out of 100 on the technical criteria. Alfanar may invite shortlisted bidders to a clarification interview before award; interview performance may be used to adjust technical scores.

A.3 Contracting and payment

The successful bidder will be engaged under Alfanar's standard consultancy agreement. Work may not commence before the agreement is signed by both parties.

Unless otherwise agreed in the contract, payment will be made in the following instalments:

- 30% on signature of the contract and Alfanar's approval of the inception note and work plan;
- 70% on Alfanar's acceptance of all per-enterprise sessions for the relevant role; and the acceptance of the final consolidated report.

Payment will be made within thirty (30) days of receipt of a valid invoice and Alfanar's written acceptance of the associated deliverables.

Financial proposals must be quoted in Jordanian Dinars (JOD) or United States Dollars (USD), with the currency stated clearly. Quoted amounts must be inclusive of all professional fees, preparation time, local transport, and any applicable taxes and duties. Alfanar will deduct income tax at source at the rate applicable under Jordanian law. Bidders must state whether they are registered for General Sales Tax and, if so, provide their registration number.

A.4 Language

Sessions and direct engagement with participating enterprises and cooperatives will be delivered in Arabic unless otherwise agreed. All written deliverables submitted to Alfanar must be provided in English, save that materials handed directly to participants must also be provided in Arabic.

A.5 Intellectual property

All reports, tools, models, templates, designs and other materials produced under this assignment vest in Alfanar upon final payment, save that brand and marketing assets developed for a specific cooperative or enterprise vest in that cooperative or enterprise, with Alfanar retaining a perpetual, royalty-free licence to use them for reporting, learning and communications purposes.

The consultant warrants that all materials delivered are original or properly licensed, do not infringe any third-party right, and are free of any encumbrance. Any third-party asset used (including fonts, stock imagery

and typefaces) must be licensed for the recipient's commercial use, and the licence transferred or evidenced at handover.

The consultant may reference the assignment in its portfolio or marketing materials only with Alfanar's prior written consent.

A.6 Confidentiality and data protection

The consultant will treat all information obtained from Alfanar, the participating enterprises and cooperatives as confidential and will not disclose it to any third party without prior written consent. Personal data must be processed in accordance with the UK General Data Protection Regulation and applicable Jordanian law, held securely, and returned or securely destroyed on completion of the assignment.

A.7 Safeguarding and code of conduct

Alfanar works with disadvantaged children, youth and women. The successful bidder and every member of its team must read, sign and comply with Alfanar's Safeguarding Policy and Code of Conduct before commencing work, and must report any safeguarding concern arising during the assignment to Alfanar immediately. Failure to comply with is grounds for immediate termination.

A.8 Conflict of interest

Bidders must declare in their proposal any current or prior commercial, financial, advisory or personal relationship with Alfanar, with any participating enterprise or cooperative, or with any other bidder. A declared interest does not automatically disqualify a bidder; an undeclared interest discovered after award is grounded for termination.

A.9 Coordination between consultants

Alfanar is contracting several consultants across its SEED and SUSTAIN tracks during the same period, and some enterprises will be supported by more than one of them. The consultant is required to take part in a joint inception call convened by Alfanar, to share relevant findings through Alfanar, and to avoid duplicating diagnostic work already completed by another consultant. Time for this coordination is deemed included in the contracted level of effort.

A.10 Alfanar's rights

Alfanar is not bound to accept the lowest-priced or any proposal and may cancel or reissue this tender at any stage without liability. Alfanar reserves the right to negotiate the scope, level of effort and fee with the preferred bidder before award, to award part of the scope only, and to split the scope between more than one bidder. All costs incurred in preparing and submitting a proposal are borne by the bidder.