

Terms of Reference for an Assessment on IFS's Next Chapter

1. Background

The International Foundation for Science (IFS)¹ has a decades-long track record of contributing to and enhancing the research capacity of over 6,000 early-career scientists² in more than 100 low- and lower-middle-income countries (LLMIC). Through grants and capacity-enhancing activities, IFS grantees acquire skills to conduct research and communicate their results, contribute to science literacy, influence science agenda-setting, and network and collaborate with their research communities to shape local and global research agendas.

As a well-known and highly appreciated organisation, IFS is not only able to contribute to global science; it is making profound differences in individual early-career scientists' motivation and careers, and in the lives of people who benefit from the impacts of their research, especially in their home countries and regions. The experience and professionalism of the IFS Secretariat makes this possible, as do partnerships with other capacity-enhancing organisations, the dedicated involvement of thousands of volunteer reviewers, advisors and alumni, and of course, funding partners.

IFS's primary donor since its inception has been Sida³, and its home has always been in Stockholm. Despite its unique niche and track record, it has proved increasingly difficult for IFS to secure the support of other major funding bodies. The need for greater and more widely shared financial support is based on the premise that: 1) what IFS does is necessary but would be more efficient and effective if scaled up, and 2) IFS's legal home in Sweden limits ownership of IFS by the "Global South" (even if its Board of Trustees [BOT] has an international profile reflecting IFS's geographic reach).

Sida is funding this *Assessment on IFS's Next Chapter*, which is intended to set out what an "IFS 2.0" will look like, one that builds on its experience and capacity and that is better enabled to partner with a greater diversity of donors, including from the "Global South". IFS welcomes fresh thinking and dialogue on what shape the Foundation (or a program building on IFS's work) may take in future. The new perspective should also go beyond practicalities to better align with innovative approaches to mentoring early-career scientists. Clearly, the validity of a model where a number of people sit in – or work from home with – an office located in a particular place can be questioned, especially now that the world is embracing other organizational and operational forms.

A "new" IFS (or IFS-inspired program) should adopt ever-evolving communication infrastructure and modes to keep the Foundation aligned with contemporary thinking and practise in support of early-career LLMIC scientists. At the same time, it is essential that the

¹ IFS was established in 1972 by Academies of Sciences from a dozen countries around the world as an independent, globally-operating, fundraising-financed foundation.

² Their high-quality research is situated within the areas of terrestrial and aquatic natural resources, and their conservation, management and sustainable use; and food and nutrition security, including relevant social and economic aspects.

³ Sida will phase out its current support from 2022, so that the ongoing grant activities should finish within the next couple of years, following the development of an agreed phase-out plan.

learning and capacities acquired and consolidated by IFS over the last 50 years be absorbed into its new form (making it a true learning institution), and that the perspectives of current and potential donors should be reflected in the Assessment.

We are optimistic that this Assessment will result in a next chapter for IFS that will be held up as an exemplar of what is possible when relocating a development organisation from the “Global North” to the “Global South”.

2. Objectives and Components of the Assessment

The Assessment Team will make specific recommendations on developing a program that better supports early-career scientists in LLMICs in line with specific requirements and expectations of LLMIC partner institutions and scientists, and with evolving donor thinking.

The Assessment has three objectives:

1. Identify the needs of early-career LLMIC researchers and what role a “new” IFS (or IFS-inspired program) could have in filling them
2. Identify suitable regions, countries and institutions to host “IFS 2.0”, and
3. Gauge the interest from potential funders.

Objective 1 can be addressed through an exploratory study which:

- Describes the current and evolving research landscape for early-career LLMIC scientists, including links to regional or global strategies in science, technology and innovation
- Outlines research and capacity-enhancing needs of early-career LLMIC scientists,
- Outlines the gaps in current funding for early-career LLMIC scientists, and
- Proposes innovative strategies and practical approaches for an “IFS 2.0”.

Objective 2 will be more of a preliminary feasibility study which:

- Shifts IFS’s “centre of gravity” to the “Global South”, and considers the optimum format to do so
- Maps potential countries and institutions for hosting an “IFS 2.0”, in Africa, Asia, and Latin America and the Caribbean (Consideration should be given to narrowing the geographical focus: Should it be on Africa only? Or keep options open? What (dis)advantages are there for an IFS program to focus on Africa and / or to remain international with a mandate in Asia and Latin America and the Caribbean?)
- Explores legal and organisational considerations: i) embedded in a well-established academic institution as autonomous unit, ii) embedded in a well-established research and resource centre; iii) autonomous stand-alone institution but associated with a well-established academic institution with a governance body registered in an LLMIC, and
- Proposes criteria for host institution selection, for example:
 - Interdisciplinary centre with focus on land, water and agriculture, also covering social science and economic aspects

- Multicultural institution (multilingual)
- Scientific and capacity-enhancing track record
- Regional (or pan-African) mandate
- Strong link with regional economic bodies, and
- Familiar with existing partnerships and capacity-enhancing organisations.

Objective 3 can be approached as a funder analysis which:

- Builds understanding of the roles and (policy/financing) priorities of national and regional science institutions, and international funding agencies, and
- Maps the interest of potential donors, and investigates the circumstances under which they would be interested in supporting IFS.

3. Methodology and Activities

The Assessment Team and IFS will agree on the methodology for the Assessment. It is expected that the Assessment will include:

- Selected countries and institutions for comparative in-depth analysis
- Literature review and desk study
- Existing data and information to be provided as requested and available from the IFS Secretariat
- Virtual interviews with key informants from universities and research centres, including PhD students and graduates; regional and international organisations and NGOs; ministries of science, research and higher education
- Review of regional and national policy documents to identify regional national-level research agenda and enabling systems
- Landscape analysis of the current support available to emerging researchers in IFS's priority geographic areas, for both research funding and other kinds of capacity enhancement
- Mapping of funding bodies and programs in those regions, as well as research themes and modes of research being supported, that would help IFS secure its niche
- Virtual interviews with representatives of IFS BOT and Secretariat, Sida and other key funding bodies, and
- Meetings to present the Assessment workplan and later the outcomes of the Assessment.

4. Expected Outputs

The Assessment Team will present and assess the pro and cons of possible pathways and roles for a future IFS. In particular, it is expected that there will be specific recommendations on:

1. Research and capacity-enhancing needs of early-career LLMIC researchers and the role of a “new” IFS (or IFS-inspired program) in helping meet them
2. Suggestions on suitable regions, countries and institutions (suggested as 3-5 possibilities) to host “IFS 2.0”, and
3. A list of potential funders and their expressed priorities.

5. Criteria for Consultants

The Assessment Team should:

1. Appoint a Team Leader (how and whom to be decided) who is also responsible for guiding the report through its drafting, revising and finalising
2. Be balanced by gender and region, with representation from IFS's key constituencies (i.e., LLMICs)
3. Have members with experience of research in both natural sciences (with openness to sustainability and society) and/or social sciences (with openness to sustainability and nature)
4. Include one (or two) members with experience from work, research and/or policy in or related to development assistance, in particular among potential donors
5. Know how research organisations such as IFS operate with their constituencies, especially grantees, and
6. Have experience in leading and managing organisational change.

6. Workplan and Schedule of Activities

It is expected that the assessment will take four (4) months, from the beginning of November 2021 until the end of February 2022 (see section 8 below).

After the Assessment is commissioned, the Team will produce an Inception Report (with proposed workplan and schedule of activities) by a deadline to be determined. This will be presented to an Inception Meeting with IFS and Sida⁴, for review, feedback and discussion, to ensure that there is agreement on the assignment. The Inception Report will be approved by IFS before the Assessment proceeds.

Following the Assessment, the Team will produce a first draft by mid-March 2022, which will be reviewed and commented on by the IFS BOT and Sida (within two weeks), and returned to the Team (within two weeks) to finalise their report by mid-April 2022. The final draft will be circulated again to BOT members for consideration⁵, after which the report (plus views of the IFS BOT) will be presented to Sida (and in time to other donors). The Team, however, have the sole and independent ownership of the final report.

7. Costs

The costs will be limited to those of the Assessment Team, plus any necessary travel costs, and any additional costs agreed as necessary, within a maximum budget of 1,000,000 SEK. It is up to the Team to propose how they will organise the work in terms of individuals' levels of effort. A Call of Interest will be publicised through relevant channels, seeking tenders from prospective consultants.

⁴ Whether to include other IFS donors and stakeholders in the Inception meeting is to be considered.

⁵ The IFS BOT can also hold an extraordinary meeting at any time should that be determined to be necessary.

8. Call for Tenders

The tentative timeline for the Call for Tenders and Inception is:

- Announcement of the TOR in mid-June 2021
- Receive tenders by end-August
- Select and announce winning tender by mid-September (two weeks)
- Receive Inception Report by end-September (two weeks)
- Hold Inception Meeting by mid-October
- Assessment starts at the beginning of November and finishes end-February 2022 (four months)

9. Selection Criteria for Prospective Consultants

These criteria (and their weights among 100 points) will be used to assess the tenders of consultants responding to the Call of Interest, in terms of suitability:

- a. Team Leader (25 points of 100)
- b. Team Members (20)
- c. Methodology (15)
- d. Workplan (15)
- e. Cost (25)

Tenders which receive more than 45 points (for criteria a, b, c and d) will proceed to cost review.

Suitability of the Team Leader and Members

The experience of the Team Leader and Team Members will be assessed with reference to the Criteria for Consultants (above in section 5). It is expected that the composition of the Team will meet the whole set of criteria, and not that any individual meets all of them. The consultants' experience in areas comparable to the tendered Assessment, the scale of past experience, and the role undertaken will be considered. Required information includes a list of relevant projects previously undertaken and for each one:

- Description and relevance to the tendered Assessment
- Role of the consultant, and
- Project duration and cost.

Suitability of the methodology

With reference to sections 3 and 4 above (and building on these points), the methodology for the Assessment is expected to include:

- An Assessment design
- Division of work within the Team
- Documenting and reporting system, and
- Innovativeness of approach.

Suitability of the workplan

The proposed workplan and schedule of activities should be timed around the milestones mentioned in section 6.

The commencement and completion dates and other implementation arrangements for the Assessment, including any travel, are indicative and will be agreed with the first-ranked Team at contract negotiation, taking into account the prevailing situation with regards to the COVID-19 pandemic at that time.

Suitability of the cost

With reference to section 7, the tender should provide clear justification for costs.