TIFD Process Design and Facilitation: Call for Proposals

***UPDATE:*** We have been receiving great questions from prospective applicants. To ensure that we are providing everyone with the same consistent information, we will be issuing an FAQ that responds to your questions, which will be made available on our website under the ‘Resources’ section and posted to social media. As such, we have decided to extend the deadline for submission of proposals until **June 30.***

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The Task Force on Inequality-related Financial Disclosures (TIFD) project seeks applications from innovative facilitators to design and facilitate a unique and complex systems change project that seeks to center rights holders in a process to co-create a financial disclosure framework for addressing inequality.

**What is TIFD?**

TIFD is conceived as a systemic risk management framework that can reduce inequality created by the private sector. A collaboration across civil society and private and public sector stakeholders, TIFD is being co-created to provide guidance, thresholds, targets, and metrics for companies and investors to measure and manage their impacts on inequality, as well as inequality's impacts on company and investor performance. Civil society organizations, regulators, and investors can use TIFD to evaluate the private sector’s performance and hold corporations to account. In this way, civil society, regulators, and investors will be the implicit enforcers of TIFD.

We hold the firm belief that inequality cannot be replicated in the process of creating a tool to address it. As such, TIFD’s approach to standard setting is novel in that it aims to put rights holders, who can provide the clearest understanding of inequality and its effects, at the center of the co-creation process.

To create a successful framework, an Interim Secretariat has formed with representation from the Global South and Global North to steward the development of TIFD in its nascent stages. The Interim Secretariat is tasked with:

- Developing accessible, easy-to-understand information about the TIFD concept and how stakeholders can engage, including those who are marginalized, as well as their legitimate representatives;
- Building a global coalition of diverse stakeholders to contribute to TIFD’s development; and,
- Creating a transparent, fair, and facilitated process for stakeholders to co-create an inclusive and equitable governance structure for TIFD.
This RFP is being issued by the Interim Secretariat, which will be reviewing RFPs and selecting the Consultant.

What are TIFD’s near-term objectives?
The TIFD Interim Secretariat aims to have met the following milestones by the end of 2022:
- Recruit a global coalition of allies (“Coalition” and “Allies”) representing a wide range of civil society, business leaders, investors, and policymakers;
- Together with the Coalition, co-create an inclusive governance structure to govern TIFD;
- Develop a process of co-creation and of consensus-building on the methods that should drive the construction of the TIFD Framework;
- Plan for a successful transition of leadership from the Interim Secretariat to a democratically selected Secretariat;
- Appoint an Advisory Council to provide oversight of and guidance to the TIFD Secretariat and to ensure diverse stakeholders continue to be centered;
- Launch Regional Hubs;
- Establish thematic Working Groups dedicated to different aspects of inequality, which reflect key issues and their intersectionality. The Working Groups will map existing disclosures, close gaps, and synthesize guidance for investors, companies, and their stakeholders; and,
- Launch a communications platform for members of the TIFD Coalition – including Regional Hubs, Thematic Working Groups, and the Secretariat – to work together.

Once the Governance Framework is established, subject to the input stemming from the co-creation process, we anticipate that work can commence on co-creating methods and processes to develop the TIFD framework. From 2022 through 2023, thematic and technical working groups are expected to convene to build out the disclosure framework; by 2024, we aim to have a draft TIFD framework and guidance to share for consultation. By 2025, TIFD aims to have produced guidance ready to pilot by the private sector and stakeholders. Further information is available on the TIFD website and in the FAQ and Introduction to TIFD slide deck.

What is the scope and process?
The process will be convened largely as a constructive online collaboration with some in-person convenings. The process will provide a welcoming and inclusive space for active listening and deliberation across a large number of diverse participants - anticipated to be upwards of 100 people - across differently constituted groups and formats. It will accommodate varying levels of participation, from light touch to more active engagement. Our current conception of the coalition includes the following bodies:

- **Secretariat** - for oversight of the TIFD process
- **Advisory Council** - for providing guidance to the Secretariat and raising the profile of TIFD
- **Working Groups** - for mapping existing standards and guidance, identifying gaps using an inequality lens, closing gaps, and defining metrics, targets, thresholds, and guidance
- **Technical Groups** - to lead the discussion on methods and for developing technical protocols to guide standard-setting
- **Regional Hub Stewards** - for building out the TIFD coalition of allies, hosting regional convenings, surfacing regional nuances to inequality, engaging with regulators within jurisdictions, and connecting Regional Hub participants with opportunities to co-create and engage with global TIFD partners
- **Allies** - for engaging in TIFD’s development on an ad hoc basis, as well as via regularly held virtual meetings, surveys, and other forms of feedback, and expressing general support for TIFD
- **The broader public** - for input into TIFD’s development via regularly held virtual meetings, surveys, and other forms of feedback

The process design should be able to address the following anticipated needs:

**Enabling genuine co-creation:** Effectively and meaningfully shape the design of the co-creation process and TIFD’s governance structure by successfully addressing power imbalances and polarizing language, and instilling agency and active listening among the participants. Consensus building, conflict resolution, and non-violent communication skills will be critical skills of the facilitator in this process. Successful multilingual and multicultural communication are also priorities.

**Addressing skepticism:** Thoughtfully introduce TIFD to potential civil society and private sector partners so that they can better assess the invitation to participate. While TIFD has the potential to be transformative, human rights defenders sometimes have concerns regarding the potential effectiveness of a disclosure framework; as such, it tends not to be high on their agenda. In turn, private sector actors may underestimate the value of the knowledge that civil society actors bring to the table or have concerns about engaging.

**Developing an equitable and legitimate governance framework:** Through an inclusive process involving diverse stakeholders globally, co-create a disclosure framework that is seen as legitimate by all stakeholders so that civil society (rights holders, in particular) plays an impactful, integrated role. The Framework should enable TIFD to remain true to the value of centering rights holders even as it attracts more powerful actors.

**Plugging into ongoing/planned processes:** Design a co-creation process that takes into account other related initiatives that can inform TIFD’s learning and testing, to ensure integration of both the ‘demand’ and ‘supply’ into the design process.

**Building in the capacity to track and measure:** Following Otto Scharmer’s principles of attention and intention, build into the process a practice of learning and self-reflection as means of tracking and measuring the co-design process. We envision that the resulting tracking mechanism can be used as a public communication tool to be shared with the wider public.

There may be additional needs that the Consultant identifies or that surface through this process.

**How often will the consultant interact with the Interim Secretariat?**
The design of the process will include a regular (approximately weekly) review process carried out with the Interim Secretariat and other participants, as mutually agreed with the Interim Secretariat.

What are the requirements for the Design and Facilitation Team?
TIFD is seeking a consultant (“Consultant”) to support the Interim Secretariat in designing an inclusive co-creation process and Governance structure. The Consultant will be expected to:

- Educate the Interim Secretariat on various approaches to **co-creation for systems-change projects**
  - Discuss the pros, cons, and lessons learned from case studies; and
  - Recommend models or features for the TIFD Interim Secretariat, Advisory Council, and Coalition Allies to consider based on TIFD’s mission, vision, and values as reflected in current TIFD documentation.
- Educate the Interim Secretariat on various features to consider for TIFD’s **governance structure**
  - Discuss the pros, cons, and lessons learned from case studies; and
  - Recommend models or features for the TIFD Interim Secretariat, Advisory Council, and Coalition Allies to consider based on TIFD’s mission, vision, and values as reflected in current TIFD documentation.
- Educate the Interim Secretariat on tools and platforms to aggregate, synthesize, and integrate to the greatest extent possible input from Coalition Allies on the Governance Framework, in an iterative process;
  - Discuss the pros, cons, and lessons learned from case studies; and
  - Recommend models or features for the TIFD Interim Secretariat, Advisory Council, and Coalition Allies to consider based on TIFD’s mission, vision, and values as reflected in current TIFD documentation.
- Advise the Interim Secretariat in continuous stakeholder mapping, engagement, and onboarding; and,
- Facilitate dialogue and exchange of perspectives of the TIFD Interim Secretariat and Coalition Allies to ensure diverse and inclusive participation via empathetic exchange and conflict-resolution.

What qualifications, experience, and attributes are we looking for in a consultant?
We seek a consultant team that is equipped with strong project design skills, deep knowledge of various approaches to co-creation of systems-change projects, and a proven track record in:

- Facilitating the co-creation of successful inclusive systems-change projects and governance structures;
- Designing governance and community engagement for complex initiatives involving over 100 participants spanning multiple geographies, cultures, languages, and priorities;
- Facilitating a multilingual and multi-cultural process environment across multiple geographies, including in an online environment;
- Creating a stimulating and impactful co-design experience that develops an innovative and creative temperament among the participants;
● Building a diverse team that is willing to work in a flexible, open-ended, and open-minded way, with an understanding of group dynamics and can work closely with the Interim Secretariat;
● Designing and facilitating processes involving the private sector, civil society, and government is strongly desired, as well as the ability to take an unbiased approach to facilitation regarding any stakeholder group participating in the process;
● Nonviolent communication, empathy training, consensus-building, and conflict resolution; and,
● Engaging in a purpose driven approach and has the capability and experience to track and measure progress.

What is the Timeline for the Commission Work?
Deadline for submission of tenders: 30 June 2022
Expected Term: 1 July 2022 - 1 April 2023
The expected term of this engagement is anticipated to be nine months, but is subject to change.

How can candidates apply?
Interested candidates should send an application of no longer than 5 pages that includes the following:

1. Your proposed approach
   We would like to understand your approach to this process. Provide a comprehensive explanation of the proposed process, including:
   ● Your overall strategy, approach, and team structure
   ● Your proposed process design – the methodology and methods you plan to use
   ● Your work plan – a sequence of activities that you plan to undertake
   ● Your requirements and your mode(s) of management of the process

2. A draft budget and timeline
   Provide a high-level timeline for the project, and a breakdown of the resources you require for nine months, with anticipated staff time and how it will be apportioned across the different phases of the project.

3. Your experience
   Tell us about your track record and the experience you bring to TIFD. Provide brief bios of each of the members of your team and the attributes they bring to this project.

4. References
   Provide the name and contact information for two references.

Proposals should be sent to info@thetifd.org by the 30th of June, 2022.