TERMS OF REFERENCE (ToR)

Trainer – Capacity Building on Program Delivery, Activity Management, Reporting Efficiency, and Program–Finance Collaboration

1. Background

The African Institute for Mathematical Sciences (AIMS) implements multi-country, donor-funded programs across its network of centers. Timely, high-quality narrative and financial reporting are crucial for maintaining donor confidence, ensuring prompt disbursement of funds, and safeguarding AIMS's institutional reputation.

Recent internal reviews have identified recurring challenges across centers, including:

- Delays in narrative and financial reporting
- Weak coordination between Program Managers and Finance Managers
- Inadequate activity tracking and conflicting priorities
- Inefficient personal and team workflow management
- Inconsistent implementation and monitoring of student and scholar transition support

To address these challenges, AIMS will convene Program Managers, Finance Managers, Transition Leads, and selected leadership for a Mid-Year Program Review Meeting. One full day of the meeting will be dedicated to a **practical, hands-on capacity-building workshop**, facilitated by an external trainer.

2. Objective of the Assignment

The overall objective is to strengthen center-level operational capacity to deliver programs effectively and report on them in a timely, coordinated, and high-quality manner.

Specific Objectives

The training will aim to:

1. Enhance the timeliness and quality of narrative and financial reporting through improved planning, tracking, and internal workflows.
2. Equip Program Managers with straightforward, practical tools for activity management, prioritization, and time optimization.
3. Strengthen collaboration between Program and Finance teams for activity planning, budget monitoring, and reporting preparation.
4. Clarify roles and practical workflows for implementing and monitoring transition support activities.
5. Assist each center team in developing a concrete 6-month operational action plan with clear responsibilities and internal review mechanisms.

3. Scope of Work & Deliverables

Phase	Deliverables	Activities
Pre-Training Preparation & Design (LoE of 2-3 days)	Training Design Note & Agenda - A detailed design note outlining: Training methodology and adult learning approach, learning	• Review documents, including reporting templates, sample center reports, program timelines, and finance guidelines.

Phase	Deliverables	Activities
	objectives for each session, a timed, practical agenda aligned with AIMS's reporting calendar	• Tailor content to AIMS's multi-center, donor-funded context. • Design interactive sessions emphasizing tool application, habit formation, and real-world problem-solving.
Training Delivery (LoE of 1 day)	Facilitation of One Full-Day Training	• Professional facilitation of the agreed agenda.
	Practical Training Toolkit	• Provision of all training materials, including slides, worksheets, case studies, and ready-to-use templates (digital and/or printable).
Post-Training Reporting (LoE of 1-2 days)	Final Training Report (5–7 pages)	• Develop and share a final report that includes a summary of training activities and outcomes, Participant feedback, Trainer's observations on capacity gaps, and practical recommendations for AIMS (e.g., standard tools, internal deadlines, follow-up support)
	Digital Training Toolkit	• Share electronic copies of all materials and refined templates for future use by AIMS.

4. Indicative Session Structure

Module	Focus	Expected outputs
From Overwhelm to Order – Activity & Reporting Management (Approx. 3 hours)	• Breaking reporting into proactive, manageable tasks • Designing simple activities and reporting trackers • Setting internal "pre-deadlines" and approval workflows • Visualizing milestones (e.g., Gantt-style planning)	Draft center-level activity and reporting tracker.
Time Optimization & Beating Procrastination (Approx. 2–2.5 hours)	• Prioritization techniques for program work (e.g., urgency vs. importance) • Time-blocking for report writing and focused work • Managing interruptions and competing demands • Practical strategies to reduce last-minute reporting •	Individual time-blocked reporting and work schedule.

Module	Focus	Expected outputs
The Program–Finance Handshake (Approx. 2 hours)	• Streamlining information flow between Program and Finance teams • Aligning activities with budgets and expenditure tracking • Interpreting budget vs. actuals for management decisions • Establishing simple, recurring Program–Finance check-ins • Creating a shared reporting preparation checklist	Joint Program–Finance workflow and reporting checklist.
Transition Implementation & Action Planning (Approx. 1–1.5 hours)	• Practical approaches to implementing and tracking transition support • Clarifying roles across Program, Finance, and Transition functions • Identifying risks and mitigation strategies	Joint transitions support workflow

5. Selection of the Consultant

The consultant will be selected through a competitive process based on technical competence, relevant experience, and value for money, in accordance with AIMS procurement procedures.

Evaluation Criteria

Proposals (up to five pages) will be evaluated using the following weighted criteria:

Criteria	Weight
Understanding of the assignment and clarity of the proposed methodology	30%
Demonstrated experience in delivering training or capacity-building interventions that enhance productivity, workflow efficiency, activity management, and time optimization, particularly in not-for-profit or donor-funded organizations	40%
Quality, practicality, and usability of proposed training tools, templates, and facilitation approach	20%
Financial proposal (cost-effectiveness and value for money)	10%
Total	100%

Additional Considerations

Preference may be given to consultants who demonstrate:
• Experience working with NGOs, foundations, higher education institutions, or development organizations
• A strong hands-on, practical training approach focused on behavioral change and tool adoption
• Evidence that past trainings resulted in improved deadline adherence, workflow discipline, or timely reporting

Shortlisting & Interviews

- Shortlisted consultants may be invited for clarification interviews.
- AIMS may request references or sample materials from similar productivity or workflow-focused training programs.

Final Selection

The consultant with the highest combined technical and financial score will be recommended for contracting, subject to internal approval.

Timelines

The selection and engagement of the consultant will follow the indicative timeline below:

Activity	Date
Submission of technical and financial proposals	28 December 2025
Clarification interviews (shortlisted consultants)	07 January 2026
Notification of selected consultant	09 January 2026
Delivery of the one-day training workshop	16 January 2026

Applicants are requested to send their proposals to applications@aimsric.org by 28 December 2025

AIMS reserves the right to adjust the above dates as necessary and will notify all applicants accordingly.