

Consultancy ToR: Social Enterprises Development Model

About HelpAge International

HelpAge International is a global non-profit organisation that works to improve the lives of older people around the world. We work through the HelpAge global network, an alliance of organisations committed to the well-being, dignity and rights of older people. HelpAge International, through its global network of over 200 members in 99 countries, is committed to supporting older people to live safe, dignified, and healthy lives. By fostering partnerships and collaborations, HelpAge ensures the inclusion of older people in all aspects of society and strives for a just and equitable world for individuals of all ages.

1. Background

The global development and humanitarian sector is undergoing significant change, with Civil Society Organisations (CSOs) facing shrinking civic space, increased competition for resources, and declining Official Development Assistance (ODA). As donor priorities shift and funding becomes more constrained and unpredictable, local and national NGOs are under growing pressure to strengthen organisational resilience, secure sustainable financing, and sustain their impact. At the same time, the locally led development agenda continues to advance, promoting transfer of power, resources, and decision-making to local actors, alongside increased investment in institutional strengthening, equitable partnerships, and meaningful participation. In this context, under HelpAge's capacity-sharing interventions, such as SCORE and SHAPE, a few Network members consistently identified resource diversification, including establishing social enterprises, as part of their organisational development priorities.

Thus, this ToR seeks to explore practical approaches for diversifying income and strengthening long-term financial resilience through social enterprise models. The assignment will assess best practices and lessons learned related to social enterprise models and generate practical recommendations to support Network members and partners in developing sustainable social enterprise models.

2. Consultancy Objective

2.1 Overall Objective

To provide HelpAge Network members and local and national partners with practical guidance and tools for social enterprise development models that support funding diversification, strengthen financial resilience, and enhance long-term organisational sustainability.

2.2 Specific Objectives

- To generate evidence and strategic insights on social enterprise models for HelpAge Network Members and local and national partners by assessing feasibility, opportunities, risks, enabling conditions, and organisational requirements by documenting relevant good practices, lessons learned, and experiences from

comparable contexts. The outcome of this will serve as decision-making criteria for engaging in a social enterprise model.

- To develop clear guidance and relevant tools for HelpAge Network Members and local and national partners interested in establishing social enterprises. This includes organisational-level preparedness, feasibility assessment, business model selection, risk management, implementation planning, organizational readiness assessment, and decision-making frameworks, and other relevant tools to support the practical set-up of a social enterprise model.

3. Core strategic actions

3.1 Document practical examples and good practices on social enterprise from comparable contexts by documenting 3 – 5 success and/or failure stories, enabling conditions, challenges encountered, organisational capacity, organisational culture, external policy environment, and lessons that contribute to their success and/or failure, including financial viability, governance arrangements, legal and regulatory considerations, and social impact outcomes. (starting from HelpAge network members)

3.2 Develop strategic recommendations and practical pathways for strengthening the capacity of HelpAge Network Members and local and national partners to assess, design, and establish social enterprise models based on the learnings from the documented resources.

3.2.1 Provide actionable recommendations on how HelpAge Network Members, partners and the wider CSO community can enhance organisational capacities to assess, design, test, and establish social enterprise models.

3.2.2 Identify the organisational capacities - systems, skills, governance arrangements, risk controls, and investments - required to successfully assess and establish social enterprise models.

3.3 Translate the learning and insights generated under Objectives 4.2.1 and 4.2.2 into a structured, self-paced learning package for HelpAge International network members seeking to strengthen and diversify their resource mobilization efforts through social enterprise development.

3.4 The learning material should provide practical guidance, tools, case studies, reflection exercises, and actionable resources that support organisations in exploring and implementing social enterprise models beyond institutional donor funding.

4. Scope of the assignment

The assignment will focus on documenting and translating learning on social enterprise development models that are practical, relevant, and adaptable for local and national CSOs.

4.1 Document learning and evidence on social enterprise development for local and national NGOs, including practical experiences, emerging approaches and models, success factors, feasibility considerations, challenges, and lessons learned from organisations that have developed social enterprise models as an alternative to reliance on institutional donor funding.

4.2 a practical social enterprise development guide and supporting tools for local and national NGOs to support the design and implementation of social enterprise development models, with a particular focus on assessing, prioritising, and pursuing social enterprise options that strengthen long-term financial sustainability. The guide and tools should include organizational readiness assessment tools, feasibility

assessment frameworks, decision-making criteria, risk assessment tools, and implementation roadmaps.

5. Proposed Approach

The assignment will adopt a participatory and learning-oriented approach that brings together local and national CSOs, International CSOs and relevant stakeholders to collectively explore practical pathways for social enterprise development. These include:

6. The Consultant

6.1 Facilitated regular consultation: A series of structured discussions, reflection sessions, and learning activities organised with the members of the learning platform. The process will support participating organisations to apply the learnings from the process in their own social enterprise development work while contributing to the development of resources; (In coordination with SCORE and SHAPE focal person's).

6.2 Facilitated learning exchange with Local and National CSOs having practical experience: Conduct facilitated consultations with local and national CSOs that have demonstrated experience and good practice in developing or managing social enterprise models. These consultations will document practical experiences, lessons learned, enabling factors, challenges encountered, and resources that have contributed to their success or learnings.

6.3 Facilitate Learning from INGOs and Other Relevant Actors: Conduct facilitated consultations with INGOs and other relevant organisations that have successfully implemented or supported social enterprise models. The consultations will explore their approaches, tools, systems, organisational capacities, and lessons learned, with a view to identifying practices that may be adapted and contextualised for local and national organisations.

6.4 Develop a Practical Guide and Supporting Tools on social enterprise models: Synthesise the learning and evidence generated through the consultations and learning process into a practical guide and accompanying tools. These resources should provide (1) a decision-making criterion for engaging in a social enterprise model and (2) actionable guidance for local and national NGOs seeking to establish social enterprise models as part of diversifying their funding base and strengthening long-term financial sustainability.

7. SCORE and SHAPE focal person

7.1 Establish a Collaborative Learning Platform: Facilitate a cohort-based learning process that brings together SCORE and SHAPE partners that identified social enterprise development as priorities within their organisational improvement plans (OIP). The platform will serve as a space for peer learning, reflection, knowledge exchange, and co-create the learning resource.

7.2 Develop a Self-Paced Learning Resource: Translate the guide, tools, and documented learning into a structured self-paced learning resource, including practical exercises, case studies, templates, reflection questions, and quick-reference materials. Resources should enable local and national NGOs to independently assess, plan, and strengthen their social enterprise development efforts.

8. Reporting Body

This consultancy will report to a working group that consists of HelpAge staff members as well as representatives from network members.

9. Deliverables & Timeframe

- Inception report and workplan (outlining the consultant's understanding of the assignment, including detailed methodology and tools) – by 16th Oct 2026.
- Drafted decision-making criteria and guidance for social enterprise development, including practical templates to assess organisational readiness, feasibility, risks, and implementation steps – by 4th Dec 2026.
- Final version of the guide and tools for social enterprise development, incorporating feedback – by 18th Dec 2026.

10. Consultant Profile

The consultant/firm should have the following qualifications:

- Minimum 10 years of experience in resource mobilisation within the NGO sector, with a deep understanding of social enterprise business models.
- Demonstrated experience designing or managing social enterprises under NGOs, including feasibility assessment, business model development, and implementation planning.
- Proven experience in system development such as guide/handbook, tools, templates, or learning resources for social enterprise development.
- Demonstrable experience in contributing to the localisation commitments such as Grand Bargain, Charter 4 Change or Pledge for Change.
- Familiarity with issues related to human rights, gender, age and disability inclusion.
- Strong stakeholder engagement and facilitation skills.
- Strong research, stakeholder mapping, and analytical skills.
- Proficiency in English is required.

11. Bid Evaluation Criteria

HelpAge will evaluate the bids according to the profile and experience of the consultant(s), the proposed methodology, and the financial offer.

12. Budget and Timeline

- The submitted financial proposal should be inclusive of consultancy fees, data collection costs, and taxes. The total budget for this assignment must not exceed GBP 4,000, and the inception report and proposed workplan should be aligned with this budget ceiling.
- The recruitment will be finalised by Mid Oct 2026, and the consultancy will commence directly after that.
- The consultancy will be fully online with no need for travelling.

Application Process

Interested consultants should submit the following to jobs@helpage.org :

- Profile, resume and cover letter highlighting relevant experience.
- Technical proposal that outlines the consultant's understanding of the request and the proposed methodology and work plan.
- Sample of a similar project/work.
- Financial proposal (all-inclusive within the stated budget)

Deadline for submission: Friday, 2 October 2026.