

CONSULTANCY PROCUREMENT AND MANAGEMENT

STANDARD OPERATING PROCEDURE (SOP)

Save the Children International

Somalia Country Office

Functional Area:	Procurement & Management of Consultancy Services
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1. Background

The Consultancy Procurement and Management Standard Operating Procedure (SOP) was originally developed to address operational gaps and contextual challenges in the procurement and management of consultancy services within the Somalia Country Office.

Following the release of the updated Procurement Manual v3.2 (February 2025), a formal review of this SOP was commissioned to ensure full alignment with the revised procurement framework and to further strengthen clarity, efficiency, governance, and accountability in consultancy engagements.

This revised SOP reflects the outcomes of the Consultancy Procurement and Management SOP Review Task Force, which conducted a structured gap analysis and harmonization exercise to ensure consistency with SCI's procurement policies and operational realities in Somalia.

This SOP outlines SCI Somalia's official procedures for planning, sourcing, selecting, and onboarding consultancy services, as well as for implementing and disseminating evaluation and research studies.

The SOP has been reviewed and aligned, to the extent possible, with Procurement Manual v3.2. Additional refinements have been incorporated to strengthen process clarity and ensure the engagement of high-quality consultancy service providers in a transparent and compliant manner.

This SOP applies to all consultancy procurements within the Country Office, regardless of funding source, unless donor-specific regulations impose stricter requirements. In cases where donor regulations differ from this SOP or from the SCI Procurement Manual, the more stringent requirement shall prevail.

2. Purpose of this SOP

This SOP establishes standardized procedures for:

- Planning and budgeting consultancy assignments
- Sourcing and selecting consultants (individuals and firms)
- Contracting and onboarding
- Managing deliverables and payments
- Ensuring evaluation quality assurance
- Strengthening transparency, fairness, and compliance
- Reporting and knowledge utilization

3. Scope

This SOP applies to:

- All consultancy procurements within the Somalia Country Office
- All departments (Supply Chain, E&L, Finance, HR, Technical Themes, Programs)
- All funding sources

It covers the full consultancy lifecycle:

Planning → Sourcing & Selection → Design → Data Collection → Reporting → Utilization → KPI Reporting

4. Governance & Oversight

This SOP was reviewed and updated by the Consultancy Procurement and Management SOP Review Task Force, composed of cross-functional representatives from:

- Supply Chain
- Finance
- E&
- Human Resources

The review focused on:

- Sourcing thresholds
- Advertisement windows
- Procurement Committee composition
- Evaluation criteria structure
- Templates standardization (ITT, ITB, Tender Notice)

5. Strategic Intent

This SOP reinforces SCI Somalia's commitment to:

- Quality programming
- Evidence-based decision making
- Ethical and safeguarding-compliant consultancy engagement
- Strong internal controls and risk mitigation
- Continuous improvement and learning

PLANNING PHASE				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Upload the tracker and alert on the development of ToR	Research & Evaluation Tracker	MEAL manager, area evidence and learning managers/ Project Coordinators	Project Managers Technical Specialist Research Managers Country MEAL Manager Area evidence and learning Managers	• Evaluation details included on the evaluation tracker • Thresholds to conduct an evaluation are upheld and strong justification is required in case otherwise • Payment Conditions to be included in the ToR and Contract ○ 1st payment after the inception report and data collection tools have been signed off – 40% ○ Final after the final report has been signed off – 60%
Develop and share ToR with team for comments	Sample ToR 	MEAL manager, area evidence and learning managers / Project Coordinators	Project Managers Technical Specialist Research Managers Country MEAL Manager Area evidence and learning Managers	• Clear objectives of the evaluation and evaluation criteria • Completed sections as per the ToR template • Include Log frame Indicators and data analysis plan
Sign off for ToR	Sign off	Technical Specialist/ Head of learning and Evidence,/ country MEAL Research manager	Area evidence and learning Managers Head of Themes	• Comments provided by the team have been considered • ToR is in the right template with the required sections • Decision to engage internally/externally is well advised and agreed upon • Decision to procure international or local consultant is made. • All ToRs must have a sign-off section showing prepared by, reviewed by, approved by and these must be duly signed by all members before being submitted to procurement.

				• Upload the finalized TOR/Plan to conduct the evaluation onto the Global Pipeline and Evaluation Scoring.
Advert PR and Consultancy fee PR	PR2Pay system SAP Ariba Buying	Business Owner	Procurement Team Member, Finance Team Member, Budget Holder Technical and Evidence& learning members	• Approved Terms of Reference (ToR) signed by the relevant authority. • Clear deliverables and scope of work • Confirmed budget availability and coding. • Proposed consultant selection and scoring criteria. • Expression of Interest (EOI) form attached where applicable. • Consultancy fee and advertisement PRs submitted and approved. • Donor approval obtained where required prior to advertisement.

SOURCING & SELECTION PHASE

Task	Tools	Person Responsible	Quality & Completion Check List
Procurement committee formation	PM3.2	Sourcing lead and BH	<u>PC must consist of:</u> BH/Business owner- Voting right Technical specialist / HOT – Voting right Finance – Voting right Supply Chain - Voting right Supply chain – Sourcing lead Evidence and learning person- Voting right Note: For non-evaluation consultancies, Technical and evidence and learning members may be interchangeable
Prepare the ITT with selection criteria and share with the committee members	ITT	Sourcing lead	Evaluation Criteria structure agreed and endorsed: • Essential criteria: (FAIL/PASS) • Capability Criteria: (Technical/Capability Evaluation): 70% • Commercial Criteria (Commercial Evaluation): 30% • ITT clearly states whether bidders are firms, individuals, or both. • Tax obligations clarified. • Travel and security responsibilities clarified • PC endorsement documented prior to advertisement. Note: Where individual consultants are targeted, criteria must be simplified to encourage competition without compromising capacity and quality needed.

Advertise the Invitation to tender (ITT) on SCI, Relief web and Somalijobs websites.	PM3.2	Sourcing Lead	• Publish on public platforms (SCI, ReliefWeb, and SomaliJobs (or other available webpages). • Advertisement period: - 10 calendar days for Formal Quotation thresholds. - 21 calendar days for Open Tender thresholds. <i>(Refer to Procurement Manual Section 3.2 for threshold values.)</i> • Extensions of advert period must be documented and justified. • Clarifications issued to bidders must be shared with all participants equally. Note: For lower thresholds, simple or single quotation procedures may apply. The PC will determine whether to advertise or directly engage pre-registered suppliers relevant to the consultancy scope. Best Practice: Maintain a prequalified pool of consultants for recurring assignments to improve efficiency and support organizational procurement requirements.
Submission of bids	PM 3.2	Procurement committee	• Upon advert closure, proposals must be submitted to a secure email address accessible only during the official bid opening session. • Tender Email access must be controlled by the IT to maintain confidentiality and integrity of the process. • Bid can also be submitted on Prosave
Bid Opening and downloading	PM3.2	IT and procurement committee	• All bids must be downloaded in a recorded session. • Bid documents shall be circulated to all PC members immediately after opening. • A minimum of three voting PC members must be present during the bid opening.

Bid Evaluation and due diligence	EMP & PM 3.2	Procurement Committee	• Evaluation must strictly follow the pre-established criteria. • The PC will jointly assess bids, and outcomes must be documented in official meeting minutes. • Only bidders passing the essential criteria proceed to technical and commercial evaluation. • Late submissions shall not be accepted unless a documented system failure occurs. • Bidders previously suspended or formally flagged for poor performance should be reviewed and may be disqualified at the essential stage with documented justification. Following the technical evaluation assessment outcome, the top three bidders shall be shortlisted for interviews. Shortlisting only two bidders is permissible where justified, agreed to by the PC, and recorded in the meeting minutes. Technical evaluation form.xlsx
Interview	Interview questionnaires, EMP & PM 3.2	Procurement committee	• Interviews shall be conducted where the consultancy scope is complex, high-risk, or high value; where some or all shortlisted bidders are new to SCI; or where further clarification of technical or financial proposals is necessary. • The decision to conduct interviews must be agreed upon and documented by the PC. • All shortlisted bidders must be treated equally and evaluated using a consistent methodology Exception: Where bidders have a proven record with SCI, propose comparable team compositions, and demonstrate consistent

			performance, the PC may skipped interviews and proceed with the highest technically compliant and best-value offer, including price negotiation if appropriate. When Interview is required and advised by the technical lead • The Sourcing Lead coordinates with the shortlisted bidders scheduling the interview with at least two working days' notice. • The Technical Lead prepares structured interview questions, including at least one safeguarding-related question. • Consistent questions for all bidders • Completed interview grids must be signed and submitted to the Sourcing Lead. • Conflict of Interest Management: All participants must declare conflicts prior to involvement. • Results are consolidated and presented to the PC for final decision. • Meeting minutes must be finalized and signed within three working days.  Interview assessment form.doc
Contract preparation	PM 3.2	Sourcing Lead	• Ensure complete procurement file. • Ensure supplier is vetted and correctly registered in ProSave • Using SCI consultancy contract template, draft contract reviewed by Business Owner and Technical Lead. • Include deliverables, safeguarding, data protection, termination clauses, and all mandatory provisions • Ensure payment schedule tied to accepted deliverables. • Obtain SoD approval.

			• Issue the contract award to the successful bidder and regret letters to unsuccessful bidders within 10 calendar days • Create the contract in ProSave and ensure all supporting documents are uploaded. • Conduct kick-off meeting. • Issue the contract award to the successful bidder and regret notifications to unsuccessful bidders, • The contract duration shall be determined based on the scope of work and complexity of the target locations
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DESIGN PHASE				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Inception Report submitted by the consultant and reviewed	Inception Report 	Area evidence and learning Managers/Coordinators/project MEAL coordinators	Project Managers Technical Specialist Research manager, Country MEAL Manager Area evidence and learning Managers	• Report completed as per the template • Indicators in the log frame are captured in the inception report. • Detailed evaluation matrix included as part of the inception report. • Detailed work plan and data collection tools included • Inception Report shows consultant has clearly understood the assignment • The consultant to attend the inception meeting to present inception report • The duration of the inception will be determined based on the nature and scope of the study
Sign off for Inception Report	Email sign off	Two sign off from: 1. Technical Specialists/ Head of Theme,	Area Evidence & Learning	• Comments provided by RMs, PMs, RCs, advisors have been considered

		2. Head of L&E/ Country MEAL Manager/ Research Manager	Manager/project MEAL manager, Program manager	- Indicators in the log frame are captured in the inception report. - Issue a completion certificate duly signed by ES and TS for use during processing first instalment of the payment. - Procurement to only initiated processing of first instalment when the completion certificate is issues. - Sign off within 5 working upon receiving the final inception report with tools
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DATA COLLECTION				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Training of enumerators	List of Enumerators	Area evidence & Learning Managers/Coordinators	Project Manager Project MEAL Manager/Coordinators	- Present details of the project - Ensure consultant has been trained on child safeguarding, code of conduct, anti-harassment policy and then transfer to the enumerators - Study lead presents on research ethics and review xls form - Its preferred to use SC prequalified enumerators
Supervise the data collection and support in the logistics		MEAL Coordinators/Officers	Area Evidence & Learning Managers/Coordinators Project MEAL Manager/Coordinators	- Looking at the process of data collection and flagging issues, - Sample a few data collection sites and physically check how data collection is being done. This should be through surprise visits.

REPORTING PHASE				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Draft report shared and Reviewed – 1 st review	Reporting Template 	Study lead Project MEAL Manager/Coordinators	Technical Specialist Country MEAL manager Research Manager/ Program Managers Head of Themes Area Evidence & Learning Manager Head of E&L, Learning and Impact Coordinator	• All sections of the reporting template have been completed • Review the report and score using the Evaluation Quality Assessment Score Sheet • Technical team and PM have reviewed the report • Learning and Impact Coordinator will ensure the report is used SCI reporting format and compliant with SCI branding and intellectual property rights guidelines and that it can be used for learning and adaptability.
Comments by the team and scores shared with the consultant for report revision	Evaluation Review & Feedback Form 	Study lead Project MEAL Manager/Coordinators	Technical Specialist Program Manager	• Comments have been compiled in the evaluation review and feedback form • The comments have been shared with the consultant including the scores
Revised report shared with the team to check if revisions done – 2 nd Review	Evaluation Scoring Sheet 	Study lead Project MEAL Manager/Coordinators	Technical Specialist Country MEAL Manager, Research Manager/ Program Managers Head of Themes Area evidence & Learning Manager Head of E&L(HEAL)	• Check if the comments have been addressed • Score the report to check if the report is above 80% • Consultant to put comments on the feedback form
Final report has been submitted	Reporting Template	Study lead	Technical Specialist Program Manager	• Final report has addressed comments from the teams

with data sets and a presentation done by the consultant – Final Review	Evaluation Management Response & Action Plan	Project MEAL Manager/Coordinators 		• Data sets have been shared with SC • Validation Meeting has taken place with presentation done by the consultant on findings and recommendations – dissemination workshop • Score the report to check if the report is above 75% • Develop agreed evaluation action plan
Sign off for the final report – Final payment done after this sign off	Evaluation Management Protocol Email sign off	Technical Specialist	Head of Themes	• If the score is less than 65%, then the evidence and learning and TS should discuss suspension. • Share the disqualified list with procurement and PDQ team. • Issue a completion certificate for processing final installment.
Postmortem of the evaluation process and assessment of the consultant performance		Procurement Manager	Study lead Area Evidence & Learning Managers Country MEAL Manager/ Head of Evidence & learning, Technical Specialist	• Document any challenges from the process and areas of improvement • Document any weaknesses of the consultant • The procurement committee is to consider justification for suspension and make a decision.

UTILIZATION PHASE				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Evaluation management response shared by CO and teams have	Evaluation Management Response & Action Plan 	Learning and impact coordinator	Study lead Program Manager Technical Specialist	• Management Response form completed • Evaluation Action Plan form completed

agreed on actions				
Sign off for agreed actions		Technical Specialist	Study lead Project MEAL Manager/Coordinators	• Actions are SMART with appropriate due dates
Actions uploaded on the Learning Database and MEAL online tracker	MEAL Tracker	Learning and Impact Coordinator		• Evaluation and Research Tracker has been updated (To develop automated tracker) • Evaluation documents uploaded on SharePoint • Actions have been signed off by TS
Develop dissemination plan for the findings and results	SC Somalia Dissemination Guide.docx 	Learning and Impact Coordinator	Country MEAL Manager Research Manager/ Technical Specialist	• Use dissemination guide

GLOBAL KPI REPORTING				
Task	Tools	Person Responsible	Person Input Required	Quality & Completion Check List
Complete evaluation summary form and share final report for uploading	Evaluation Summary Form 	Study lead	Learning and Impact Coordinator	• Ensure that the report to be uploaded is the signed off final report • Evaluation action points have been uploaded on MEAL tracker
Upload the final signed off report onto the Global Pipeline	Global Pipeline and	Learning and Impact Coordinator	Study lead Project MEAL Manager/Coordinators Technical Specialist	• The center team will store the evaluation, based on the evaluation score, revisit guidance provided under the reporting section.

and Evaluation Scoring	Evaluation Scoring.		Country MEAL Manager	
Share comments and scoring to the team for improvement		Learning and Impact Coordinator	Study lead Project MEAL Manager/Coordinators Technical Specialist MEAL Manager	• Check if there are comments that require immediate actions