45 Kyalami Boulevard
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SOUTHERN AFRICA TRUST

Terms of Reference (TORs)

Consultant for the Development of a Solidarity Economy Standards Paper for the Southern Africa Trust Fund

1. Background and Context

The Southern Africa Trust Fund (SATF) works to end poverty and inequality in Southern Africa through deliberate feminist and intersectional lenses, in line with its regional strategy, Seriti (2024-2030), which embodies the spirit of care and places people, their humanity, value and desires at the heart of all interventions. Under its Economic Justice and Social Protection pillar, and through the RISE initiative (Regenerating Impact, Stewardship and Equity in the Critical Minerals Value Chain in Southern Africa), SATF supports solidarity economies and care-centred livelihood models as viable alternatives to extractive and exclusionary economic patterns.

A central instrument of this work is SATF's regranting facility, through which 8 to 10 small grants will be awarded to community-led partners in the second half of 2026, with targeted quotas for youth-led and women-led groups. To ground this grant-making and the broader solidarity economies portfolio in a coherent, defensible framework, SATF seeks a consultant to develop a Solidarity Economy Standards paper which includes a conceptual framework, guiding principles, a typology of solidarity economy models, standards, indicators, operational guidance, and learning considerations. The standards will define what SATF understands and supports as solidarity economy practice, set criteria and care and gender indicators, and be translated into grant-making criteria applied in the regranting cycle.

2. Problem Statement

Solidarity economies in southern Africa are deeply context-defined. They span a diverse range of iterations, including worker cooperatives, community banks, savings and credit groups, giving circles, burial societies and mutual aid networks, each shaped by the histories, cultures and material conditions of the communities that build them. The support these initiatives require is equally context-defined, ranging from seed capital and technical accompaniment to legal recognition, market access and protection from co-option. This diversity is a strength of the solidarity economy, but it presents a practical challenge without a clear and shared framework, grant-making risks becoming ad hoc, spreading limited resources across initiatives the organisation is not best placed to support, or applying templates that do not reflect community-rooted practice. The Standards Paper responds directly to this problem. It will clarify, given SATF’s strategies, capacities and available resources, which segments of this diverse economy SATF can realistically and meaningfully support, how it should do so, and with whom, so that the regranting facility and the wider solidarity economies portfolio rest on deliberate, defensible and feminist choices rather than case-by-case improvisation.

3. Objectives

Overall Objective

To develop a clear, practical and feminist Solidarity Economy Standards paper that defines SATF's standards for solidarity economy practice and provides the framework for its regranting and portfolio decisions.

Specific Objectives:

- Define solidarity economy concepts, principles and models relevant to the Southern African context, grounded in community-rooted practice and feminist economics and informed by documented examples and case studies from the region.

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- Develop clear standards and criteria for identifying, supporting and assessing solidarity economy initiatives, including care and gender indicators.
- Translate the standards into practical grant-making criteria for SATF's call for proposals and grant assessment processes.
- Recommend how the standards should be applied through grant accompaniment, learning and documentation in the 2026-2027 regranting cycle.
- Deliver a launch-ready paper to be presented at SATF's regional convening in the third quarter of 2026.

4. Scope of Work

The consultant(s) will be required to:

- Conduct a focused review of solidarity economy literature, frameworks and standards, including African and Global South practice, cooperative and social economy models, and feminist economic thought.
- Review SATF's strategy documents, RISE concept and regranting approach to ensure the standards align with SATF's principles of decolonisation, locally driven development and care.
- Consult selected SATF staff, partners and community practitioners to ground the standards in lived practice. This should include a minimum of 8–12 key informant interviews and consultations with relevant solidarity economy practitioners, feminist economists and community-based organisations.
- Draft the Solidarity Economy Standards paper of not more than 25 pages (excluding annexes). The paper should include conceptual framework, definitions, typologies of solidarity economy practice, standards, criteria and care and gender indicators, implementation guidance, and monitoring and learning considerations.
- Develop a practical annex translating the standards into grant-making criteria, scoring guidance and accompaniment considerations.
- Facilitate a validation workshop with SATF and partners, and incorporate feedback.
- Finalise the paper to publication standard and support its presentation at the regional launch convening.

5. Methodology

The consultant(s) must employ a participatory approach combining desk review, key informant consultations and validation with SATF and partners. The methodology must apply feminist and intersectional lenses throughout, ensuring the standards reflect the realities of women, youth and community-led initiatives rather than imported templates, and remain practical enough to guide real grant-making decisions.

6. Deliverables

- Inception note (within 5 days of commencement): refined methodology, workplan and annotated outline of the standards paper.
- Draft Solidarity Economy Standards paper (by 4 September 2026): complete draft including standards, criteria, care and gender indicators, and the draft grant-making annex.
- Validation workshop (by 15 September 2026): presentation of the draft to SATF and partners for feedback.
- Final standards paper and grant-making annex (by 30 September 2026): publication-ready paper incorporating all feedback, with the annex finalised for immediate use in the call for proposals.

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- Launch presentation materials (Q3): PowerPoint presentation and participation in the regional launch convening.

7. Timeframe

The assignment will commence on 1 August 2026, with the final paper due by 30 September 2026, ahead of the opening of SATF's call for proposals, and launch support extending into the last quarter of 2026. Key milestones:

Timeframe	Milestone	Deliverable
1 - 7 August	Inception phase	Inception note
8 - 21 August	Desk review and consultations	Progress update
22 August - 4 September	Drafting of standards paper and grant-making annex	Draft standards paper
5 - 15 September	Validation and feedback	Validation workshop
16 - 30 September	Finalisation	Final standards paper and annex
October - December (date to be confirmed)	Regional launch convening	Presentation materials and launch participation

8. Team Composition and Qualifications

The consultant(s) should possess the following skills, knowledge and competencies:

- Demonstrated experience applying feminist, intersectional and decolonial analytical frameworks and tools in research, policy development programme design or grant-making processes.
- Advanced degree in development studies, economics, or a related field.
- Minimum 8 years' experience in solidarity economies, cooperative development, social and informal economies, or feminist economic alternatives in Africa.
- Demonstrated experience developing standards, frameworks or grant-making criteria for development organisations or funds.
- Strong understanding of the Southern African political economy and of community-led economic organising.
- Excellent feminist analytical and writing skills, with the ability to produce clear, practical and usable frameworks.

9. Reporting and Management

The consultant(s) will report to SATF's Economic Justice and Social Protection Lead and will work closely with the Grants team, the Research and Learning Officer and the Programs Unit team. Reporting requirements include weekly progress updates via email, bi-weekly check-in calls, and presentation of key milestones (inception note, draft paper, validation). Quality assurance will be provided by SATF's internal review panel.

10. Budget and Resources

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Consultant(s) must provide a detailed financial proposal for the consultancy services. SATF will provide relevant organisational documents and contacts, access to its regranting frameworks and partner networks, and logistical support for the validation workshop and launch convening.

11. Application Process

Prospective consultants are invited to submit a technical and financial proposal covering the whole scope of work. Applications open on 8 July 2026. Submissions can be made to jmudzviti@southernafricatrust.org and copy amumba@southernafricatrust.org no later than 22 July 2026 by close of business. Selection will be concluded by 31 July 2026 and the assignment commences on 1 August 2026.

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