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Advisory services resource pack for Organisations of Persons with Disabilities: Overview of the package



Prepared by the Inclusion Advisory Group (IAG) of CBM Global Disability Inclusion, with input from the Pacific Disability Forum.

Many of the resources in this package have been adapted from draft guidance developed in 2020 by CBM Global, the Pacific Disability Forum and Deborah Rhodes (independent consultant), with the support of the Australian Government through the Australian NGO Cooperation Program (ANCP).

Introduction

Increasingly, organisations of persons with disabilities (OPDs) are being asked by development and humanitarian organisations for advice on disability inclusion. They can be asked to provide advice in paid consultancy-style roles or are funded to be an advisory partner to a project. We are calling this work 'advisory services.'

OPDs have found that many requests for advisory services are well-aligned to their own interests and priorities. Other times, there are concerns within OPDs about whether to proceed and how. Since many OPDs have been established to undertake advocacy, rather than deliver paid services, some have experienced complications. Some OPDs see that providing advice services complements their advocacy work, while others see it as more challenging.

This resource pack has been developed by CBM Global's Inclusion Advisory Group (IAG), and largely draws from previous guidance commissioned by IAG and the Pacific Disability Forum (PDF). The resources are based on: findings from a workshop held with commissioning organisations, OPDs, donor agencies and contractors; consultations with OPDs in Asia and the Pacific about their experiences of delivering advisory services; and IAG's experience of and internal resources for scoping and managing advisory services. They incorporate feedback from multiple OPDs in Asian and Pacific countries.

This resource pack is not intended to encourage OPDs to start providing advisory services if they have not done so before, but to support OPDs if and when a decision is made to work this way. The guidance recognises that there is no 'right way' to provide disability advisory services, since each OPD, each context and each relationship are different. Rather, it is hoped that the suggestions and tools provided in this resource pack can be applied and adapted to suit different countries and contexts, and can be complemented by coaching, mentoring, peer exchange and opportunities to learn from experience.

Contents of this package

This resource package is intended to support OPDs to consider and manage their involvement in providing advisory services. **The package includes seven resources that provide guidance relating to each stage of the advisory services process**, from reviewing a new opportunity that has come up, through to delivering and reporting on services. The package also includes several practical tools, such as checklists or templates, which relate to each stage of the process.

Title of resource/tool	Contents
Overview of the resource package	This document – an overview of the resource package, its contents and why it has been developed.
Resource 1: Reviewing advisory opportunities	Guidance on decision-making related to possible new advisory opportunities.
Tool 1.1: Appraisal criteria for new advisory opportunities	Questions and criteria to help decide about whether to go ahead with a new advisory opportunity.
Resource 2: Negotiating scope of work	Guidance on negotiating and agreeing on the scope of work for advisory services.
Tool 2.1: Checklist for reviewing draft terms of reference	Questions and considerations to help in reviewing a draft scope of work or ToR for advisory services.
Tool 2.2: Common elements of advisory services terms of reference	Example elements that are commonly covered in ToR or scope of work for advisory services.
Resource 3: Setting advisory fees and budgets	Guidance on setting fees and drafting budgets for delivering advisory services.
Tool 3.1: Guidance for estimating advisory fees	Questions to guide OPDs in setting professional fees for a specific piece of advisory work.
Tool 3.2: Checklist for setting advisory budgets	Checklist to guide OPDs in drafting or reviewing budgets for delivering advisory services.
Resource 4: Contracting	Guidance on contracting and other legal arrangements to deliver advisory services.
Resource 5: Setting up a project	Guidance on the process of setting up a new advisory services project.
Resource 6: Monitoring and reporting	Guidance on monitoring and reporting on the delivery of advisory services
Tool 6.1: Questions to reflect on progress	Questions to use to monitor and reflect on progress against plans to deliver advisory services.
Tool 6.2: Template for advisory services report	Template to help structure a report on advisory services that have been delivered.
Resource 7: Risk management	Guidance on managing risks that may arise while managing and delivering advisory services.
Tool 7.1: Sample risk register	Example risk register table for managing risks that may arise in advisory services work.

Background on OPDs and advisory services



What is advisory services work?

The scope of advisory work can vary widely. For example, sometimes OPDs are asked for a small piece of very specific information, such as appropriate measurements for building ramps into public buildings. Sometimes OPDs are asked for more generic or 'high-level' advice, such as how to make a whole education system or national transport system disability inclusive. Sometimes an OPD may be asked to run a large training program or provide one person to contribute to another's training program.

The scope of work and the diversity of potential topics is very diverse!



The organisations that ask for this advice include UN agencies, government agencies, international and national Non Governmental Organisations (NGOs) as well as externally funded development project teams (usually commercial contracting companies). Also, independent consultants and consulting organisations sometimes ask OPDs to collaborate on a particular consultancy, task or process, usually under contract from one of these organisations.

To influence change on disability inclusion, many OPDs have shifted attention over time from broad advocacy to more detailed provision of specific and technical advice. In addition to enabling members to talk about their lived experiences, communicating about discrimination and inclusion and formulating priority areas for change, OPDs are therefore also informing governments and other organisations how to make changes to existing laws, policies, programs and services. Governments and other organisations often do not know how to achieve disability inclusion themselves, even though they may have ratified or made commitments to the [Convention on the Rights of Persons with Disabilities \(CRPD\)](#).

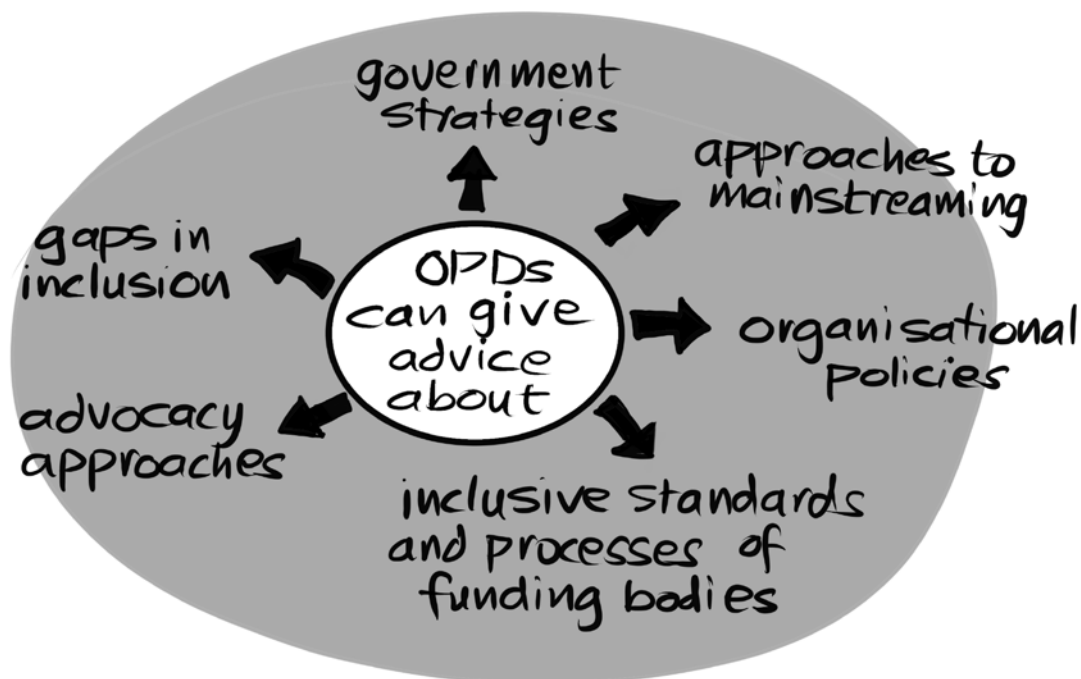
The advice requested of OPDs is often related to how other organisations' policies, programs and activities can become disability inclusive or comply with others' expectations and global agreements. This can include a range of inputs, such as participation in discussions or provision of written reports or information, that are commissioned and paid for. In most cases, the organisations that commission the advice are responsible themselves for policy or program implementation, but in some cases, an OPD also has some responsibility.

Broadly, expectations about advice might include the following:

- **Design and delivery of training on disability rights, disability perspectives and interaction** with persons with disabilities, or inclusion for government officials, NGO staff or program teams.
- **Advice on how legislation or policies can be changed** to make them compliant with the CRPD, Sustainable Development Goals (SDGs) or regional or national disability strategies.
- **Suggestions on how to ensure a development or humanitarian program takes disability inclusion into account**, such as:
 - How to ensure people with disabilities are involved in designing, implementing, monitoring and evaluating activities.
 - How to identify people with disabilities in a place or sector.
 - How programs that provide services and benefits at community level can ensure people with disabilities are able to participate equally, including through reasonable accommodation or specific measures.
 - How programs which seek to influence national or local services or processes do so in ways which take disability issues into account.
 - How program staff can make it easy for people with disabilities to participate in activities meaningfully.
 - How to undertake reasonable accommodation measures for program staff and participants with disabilities.
- **Views of people with disabilities** about priorities for government attention, consistent with CRPD ratification and monitoring.
- **Drafting of manuals, application systems, documents and processes**, to enable others to work on disability inclusion, or to make documents accessible and inclusive.
- **Participation in advisory groups**, commissioned to consider the implementation of new policies, programs or activities over time, and how they can be undertaken in disability inclusive ways and appropriately monitored.
- **Provision of information about people with disabilities** who are members of OPDs, so they may be invited to be involved or included in programs.
- **Participation in monitoring and evaluation systems and processes**, to identify whether inclusion goals are being achieved.

OPDs can provide advisory services in a range of ways. For example, they could:

- **Use their own staff as advisers**, with funding coming to the OPD itself, and staff paid their regular salary or volunteers paid for services.
- **Appoint others to represent the OPD**, without being a board or staff member.
- **Be part of an advisory team**, alongside others representing various perspectives.
- **Provide documented generic advisory guides** about disability inclusion or specific topics, such as accessibility audits, the national situation for persons with disabilities, the need to consult OPDs on all topics of relevance to the lives of members, or other general points.



The context: OPDs and requests for technical advice

Implementing the Convention on the Rights of Persons with Disabilities (CRPD), Sustainable Development Goals (SDGs), or the UN Disability Strategy (UNDIS) and the broader 'leave no-one behind' agenda has led to **an increase in demand for advice on disability rights and inclusion** from governments, donor, UN agencies, international and national NGOs and other development and humanitarian organisations and programs. This situation has led to these organisations asking OPDs for specific, technical, or ongoing advice. It has also led to growth in the number of independent (or commercially-based) consultants who offer advice on disability inclusion.

Many organisations expect they can achieve compliance with international or donor-driven disability inclusion standards for their policies and programs, through a combination of consulting OPDs and tasking independent specialist consultants. Also, as Governments around the world are reporting on their achievements and plans in relation to CRPD, they and their development partners increasingly look to OPDs or consultants to assess progress and identify priority areas of focus and make changes.

Providing specific or technical advice on disability inclusion to other organisations under contractual arrangements can be difficult, for several reasons:

- OPDs might not be set up to provide specific technical consultancy services to other organisations.
- Organisations asking for advice may not already have a good understanding of disability rights and disability inclusion, or the role and experience of OPDs. For example, an organisation may ask an OPD to manage a charity for persons with disabilities or manage construction of an accessible public building.
- When contracts are entered into, they bring extra expectations for those who sign them. These expectations may be difficult for some OPDs to meet, for example, in terms of compliance with legal and financial regulations. Finally, OPDs' organisational values may not suit a commercially oriented, contract-based relationship with other organisations.

Organisations that commission OPDs to provide advice may have different values from people who work in OPDs: this may require navigation. For example, some organisations are driven by a perception that getting 'tasks' done is most important (or making profits or following rules), while others are driven by a perception that maintaining harmonious relationships is most important. Some organisations are very hierarchical, and others are more egalitarian. Some are more comfortable with wanting to make changes than others and the kinds of changes that are being sought, may differ widely. Some are driven by keeping costs down, while others are prepared to pay what it takes to match the principles of inclusion or achieve a result. So, even if OPDs and other organisations may both be interested in achieving disability-related objectives, they may have beliefs or values that clash: this can make working together challenging!

While the CRPD has been in place since 2006, many people involved in international development and governance generally are still unfamiliar with disability rights' perspectives. This means that people and organisations who develop terms of reference and contracts related to the provision of advice from OPDs may have varied levels of understanding about the context or of what constitutes 'good quality' advice in disability inclusion and what is the appropriate remuneration level to compensate for such advice. This means that OPDs may need to advocate to ensure that terms of reference and contracts are appropriate and respectful, from early discussions.