



# Strategic planning

Terms of Reference

## About CEMR and PLATFORMA

The Council of European Municipalities and Regions (CEMR) is the broadest organisation of local and regional authorities in Europe. Its members are over 60 national associations of municipalities and regions from 40 European countries. Together these associations represent some 150 000 local and regional authorities.

CEMR's objectives are twofold: to influence European legislation on behalf of local and regional authorities and to provide a platform for exchange between its members associations and their elected officials and experts.

Moreover, CEMR is the European section of United Cities and Local Governments (UCLG), the worldwide organisation of local government.

CEMR is the lead partner and coordinator of PLATFORMA – a pan-European coalition of 31 local and regional governments, and their associations representing them at the national, European and global levels, engaged in decentralised development cooperation. It is co-financed by the European Union, and currently focuses on four main strands of work: advocacy, capacity-building, awareness-raising and internal governance. In 2015, CEMR-PLATFORMA signed a Framework Partnership Agreement with the European Commission which terminate at the end of 2020.

For more information on the project, please consult: <http://platforma-dev.eu/>.

PLATFORMA is now looking for an **expert with experience in strategic framework development and participative strategic planning** to lead, with support from the PLATFORMA Secretariat, a process of **strategic reflection**, with the objective to develop a **multi-annual strategic framework** for PLATFORMA for the period **2021–2027**, based on the Theory of Change in particular.

## Expected results

The participative strategic reflection process will take 6 months (January – June 2020) and will result in:

- (i) a **multi-annual strategic framework** for PLATFORMA for the period 2021–2027 based on the Theory of Change,
- (ii) based on a consensual **vision and mission** statement for the coalition,
- (iii) supported by a well-defined narrative rationale on **outcome challenges, boundaries, and causal relations**,
- (iv) supported by explicitly formulated **assumptions and risks**,
- (v) with articulated **SMART objectives** and **key performance indicators**,
- (vi) captured in a **strategy map**.

The hierarchy of interlinked strategies (strategic framework) will provide a **multi-annual strategy** outlining the vision and mission for PLATFORMA, as well as **recommendations for key organisational**

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**strategic elements** for the period 2021–2027 (knowledge, partnership strategy, and risk management strategies).

## Participative strategic reflection process

The participative strategic reflection process will consist of (i) context analysis), (ii) consultations with partners and stakeholders, as well as (iii) participatory workshops.

1. **Context analysis.** The expert(s) will review existing strategic statements and documents of PLATFORMA, including recent evaluation reports, strategic statements and documents of coalition partners (if available), as well as EU development policy priorities, and provide a summary context analysis of boundary partners, and of principal sustainability constraints and opportunities.
2. **Consultations with partners and stakeholders.** The expert(s) will lead and facilitate a number of stakeholder consultations, such as online surveys, telephone/Skype interviews, online webinars and/or physical meetings and interviews, engaging (i) political leadership, (ii) executive and technical staff of coalition partners, (iii) CEMR-PLATFORMA management and staff, (iv) external/boundary partners, and/or (v) other stakeholders, while respecting and taking into account the coalition's institutional, political, and geographic diversity.
3. **Participatory workshops.** The expert(s) will lead and facilitate at least 3 participatory workshops with the executive and political representatives of coalition partners:
  - a. a **kick-off workshop** to present results and conclusions of the context analysis, and outline further steps and timeline in the strategic reflection process, for discussion and approval (meeting in Brussels in the week of 3 February 2020);
  - b. a **mid-term participatory workshop** to present preliminary findings from the consultations with partners and stakeholders, and outline draft statements and elements of the future strategic framework (around the Steering committee meeting in Brussels, 30 March – 1 April 2020);
  - c. a **final workshop** to present the draft strategic framework for the period 2021–2027 for final consultation, and discussion with the coalition before adoption final adoption (around the European Development Days conference Brussels, 9–10 June 2020).

## Draft strategic framework

The **final draft of the strategic framework** shall be submitted to PLATFORMA Secretariat for sharing with partners and final approval in the week of 15 June 2020.

## Technical specifications

- **Language.** All deliverables shall be provided in English. The expert shall be responsible for correct language and grammar. Documents with apparent mistakes in spelling, grammar, or style shall be rejected.
- **Format.** All deliverables shall be delivered electronically in the Microsoft Office file format (Office Open XML), OASIS file format (OpenDocument), or any other open format for storage and transmission of structured text.

- **Intellectual property and data protection.** The Contractor shall ensure the compliance of all deliverables, or their constituent parts, with applicable intellectual property legislation and personal data protection legislation.

## Profile

Interested expert(s) are expected to fulfil the following profile:

- Excellent ability to bring out new ideas;
- Strong facilitation skills;
- Strong strategic planning, analytical, and synthesis skills;
- Solid understanding of the role and functioning of local and regional governments, in particular in development cooperation through decentralised cooperation;
- Knowledge of EU development policy and objectives is an asset;
- Knowledge of EU policy-making and decision-making processes is an asset;
- Experience with pan-European networks, or other multi-stakeholder groupings is an asset;
- Fluent in English (written and spoken), and comfortable in French and/or Spanish.

## Application

Interested expert(s) are invited to apply sending the following documents:

1. **Professional curriculum vitae** of the expert(s);
2. **List of past relevant assignments** demonstrating experience with strategic evaluation, strategic framework development, and/or participative strategic planning (maximum 2 pages);
3. Proof of the **company registration and VAT registration** number;
4. **Technical offer** including a methodological proposal of the steps to follow (i.e. context analysis, semi-structured interviews etc.) and their objective, with timeline, outlining the support requested or necessary from the PLATFORMA Secretariat during the duration of the contract (maximum 2 pages);
5. **Financial offer** outlining the expected price, including any direct costs (e.g. travel expenses for meetings with the Secretariat, when applicable), number of staff assigned, suggested number of working days with daily cost, and quoted without VAT. The expected price shall not exceed the total amount of EUR 21 000 without VAT.

## Selection process and deadlines

- Interested consultants shall submit their bids no later than **13 December 2019** at 12:00 (noon) to [application.platforma@ccre-cemr.org](mailto:application.platforma@ccre-cemr.org).
- Candidates may be invited for a telephone/Skype interview to be held on 17 December 2019 (morning).
- Candidates will be informed about the outcome of the selection process by 18 December 2019.
- The final service contract will be signed by 20 December 2019

## Selection criteria

PLATFORMA will select an offer providing the most advantageous combination of cost, quality and sustainability to meet the requirements.

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