

Terms of Reference for a Consultancy to support the development of the Forus 2026-2030 Strategic plan

1. Background and objective of the assignment

Forus is a global network empowering civil society for effective social change. It brings together 69 National NGO Platforms and 7 Regional Coalitions from Africa, America, Asia, Europe, and Pacific.

As the time of Forus' [current \(2021-2025\) strategy](#) is nearing, Forus is seeking a (team of) consultant(s) to support the governance and Secretariat in the discussion and development of a strategy for the global network for the period 2026-2030.

A review of the 2021-2025 strategy, largely considered as relevant and useful, will be a basis on which to build on. The impact, strengths and gaps of the current strategy will be examined, and complemented by the gathering and analysis of additional data, in particular from the network members, as well as the integration of findings emerging from projects and their evaluations.

The (team of) consultant(s) is expected to propose work tools which will support strong ownership of the strategic development process by network members. Highly participatory approaches should facilitate critical reflection and active engagement by staff members, governance, network members and other stakeholders.

3. Scope of the Assignment

The (team of) consultant(s) will work closely with all stakeholders (Secretariat, governance, advisory group, members, and allies) including through various groups which will act as a sounding board for the strategy discussions. They will apply an analytical framework examining existing data and evaluations, as well as gather additional data and insights through surveys and interviews; provide operational support to the process; facilitate discussions and coordinate the drafting of the strategy ensuring a high level of network member engagement and feed-back loops throughout the process.

The (team of) consultant(s) will conduct a thorough but focused assessment of Forus' current strategy, theory of change, the network's strengths and weaknesses, as well as external opportunities and threats. The (team of) consultant(s) will also explore synergies with other stakeholders, advising Forus on possible duplications and complementarities, to develop the new strategy in relation to the sector's broader trends, key actors and emerging dynamics.

Reflections on emerging trends and critical focus areas will be synthesized and elaborated on in writing to produce a number of "think pieces" for further reflection in

the network. The (team of) consultant(s) is expected to draft these think pieces based on their initial review and discussions with key stakeholders.

It is expected that data will be analyzed using a rigorous analytical framework which allows for additional data (e.g. from upcoming evaluations) to be fed into the process. Regular summaries and presentations to key stakeholders shall guide the development of strategic options and their prioritization. The (team of) consultant(s) are expected to be pen-holders on any written deliverables produced, with the aim to facilitate the engagement of stakeholders around the provision of inputs and feed-back.

Through a consultative process and application of appropriate tools and methodologies (e.g. visioning exercise), the (team of) consultant(s) will support strategic foresight, the identification of focus areas, and a refined number of strategic objectives and key result areas for the coming strategy period.

1. The assessment will include a **review of relevant documents**, in particular Forus' current strategy, theory of change, key project documents, existing evaluations, MEAL framework and data, and other relevant information.
2. After an initial document review, the (team of) consultant(s) will develop an **inception report** including a proposed methodology, analytical framework and key tools and questions to be included as part of the strategy development process.
3. If possible, to complement the analysis, the (team of) consultant(s) will carry out a **social network analysis** for the global Forus network in order to gather a more granular understanding of relationships in the network
4. The (team of) consultant(s) will **draft think pieces** on various areas of opportunity and key guiding questions based on initial findings and critical questions, and insights gathered from the network. The think pieces will serve to further the consultation with all stakeholders.
5. Through appropriate tools and methodologies (e.g. visioning exercise), the (team of) consultant(s) will support **strategic foresight**, and convene one or several workshops allowing key stakeholders of the process to develop one or several vision(s) for the future.
6. The (team of) consultant(s) will support the identification of focus areas, and a **refined number of strategic objectives and key results** for the coming strategy period.
7. As such, the (team of) consultant(s) will prepare and facilitate an **in-person strategic planning workshop likely to be held in the second quarter of 2025**.
8. In addition to other virtual engagement touchpoints with Forus members and key stakeholders, the (team of) consultant(s) will also facilitate a **virtual strategic planning workshop**, to include participants (such as members of national platforms and regional coalitions) that could not attend the face-to-face workshop.
9. The (team of) consultant(s) will produce **initial draft strategic document**. This document will then be submitted to members for feedback.

10. An **updated Draft strategy document**, including various scenarios/an extended number of optional results and activities under each Objective will then be shared.
11. A **final workshop** will be then prepared and facilitated by the (team of) consultant(s) gathering Forus governance members and staff. This meeting will allow to select and decide on the main elements of the next Forus Strategy, that will then further be developed, if needed.

4. Deliverables

1. An inception report to guide the assessment, including the methodology, analytical framework, and key tools and questions
2. A social network analysis to gather a more granular understanding of relationships in the network
3. Several think pieces (number to be discussed) to trigger further reflections and feed-back
4. An agreed upon number of interviews and other data gathering exercises (e.g. surveys) as relevant
5. Preparation and facilitation of several group meetings/workshops, including 1 in-person
6. An initial draft five-year strategic plan, refining strategic options, and taking into account the outcomes of the consultations with members, stakeholders and of the strategic workshop
7. A final draft five-year strategic plan

5. Duration and provisional calendar

This assignment is estimated for a total duration of 9-12 months, with an envisaged starting date in December 2024. The collaboration might be extended upon agreement on both sides.

Deadline for applications	02 December 2024
Review of applications / Interviews	By 10 December 2024
Contracting	By 16 December 2024 or earlier
Inception phase	December 2024 -January 2025
Additional analysis and mapping out of strategic options	February-April 2025
In-person strategic workshop	2 nd quarter of 2025
First draft of strategy	June 2025
Final draft of strategy	September 2025

6. Required Skills and Competencies:

- Experience in and evidence of conducting and facilitating similar strategic planning processes with international CSO networks
- Significant knowledge of and expertise working in Global South countries is a mandatory requirement
- Knowledge and experience of using participatory approaches and innovative facilitation techniques

- Strong analytical and writing skills
- Excellent interpersonal skills and proven ability to negotiate common positions
- Ability to work with minimal supervision
- High level written and oral communications skills in English, fluency in French and Spanish are strong assets
- Results-oriented team player with high levels of enthusiasm, tact, diplomacy and integrity
- Experience in research, policy development, advocacy and capacity development-related work.

7. Application procedure

The application documents must be submitted **no later than 02 December, 2024** in electronic format to the following address: recruitment@forus-international.org with “Consultancy 2030 strategy” in the subject line.

The application should comprise:

- A technical offer including details of the proposed evaluation methodology describing the overall approach, proposed tools, and methodology
- Details about relevant experience, e.g. previous projects of similar scope, complexity, audience.
- A description of key personnel who will be part of the proposed plan as well as their CVs (attached as annex)
- 3 references (including emails) and links to previous work (if available)
- A detailed financial offer including a line-item budget and specifying daily rates. Cost estimates used to prepare the budget should be presented in Euros (including VAT if applicable, and any other taxes).

Please note that the social network analysis (optional but considered an asset) should be budgeted separately (stand-alone budget line) if included in the bid.

Applicants should clearly highlight any current or previous working or personal links to Forus, as well as any risk around conflict of interest.