

## Short term assignment - Terms of Reference

### National Municipal Strategic Planning Lead Expert

#### Position description

<b>Object</b>	Municipal Strategic Planning Lead Expert
<b>Activity reference (project logframe)</b>	<p><u>Specific Objective 1:</u> To improve the capacities of subnational governments to engage in holistic, area-based planning and consider different scenarios that respond to the needs of the host, refugee, and IDP populations.</p> <p><b>Pilot project: Strategic Planning with GIS</b></p> <p><u>Logframe activities:</u></p> <p>1.5.1 Establishment of inclusive working groups and committees with participation of host and refugee communities; propose public feedback mechanisms</p> <p>1.5.2 Capacity development on participatory strategic planning and decision-making</p> <p>1.5.3 Definition of Union Strategic Plan on basic services</p>
<b>Project background</b>	<p>MASAR for Local Governments is a program funded by the <b>EU MADAD Trust Fund</b>. The overall aim of the program is to strengthen the long-term resilience of targeted subnational governments and their host, refugee, and IDP populations to deal with displacement.</p> <p>Sub-national governments in Iraq and Lebanon have been the first to be confronted by the repercussions of the Syrian refugee crisis: increased pressure on local services, competition for local employment opportunities, eroding social cohesion, faster urbanization trends, rent-seeking behaviour, and inflation due to externally injected funds in the local economy, and so forth.</p> <p>MASAR focuses on the urban setting, which is the background of processes of displacement, investment, employment, and service delivery.</p> <p>In Lebanon, the programme aims to help governorates of Baalbek-Hermel, Akkar, <b>coastal plain north of Tripoli</b>, and their unions of municipalities to deal with accelerated urbanization caused by the crisis.</p> <p>This programme will mobilize municipal experts from Lebanon and Europe to contribute to building the capacity of subnational governments.</p> <p>This capacity development can include, among others:</p> <ul style="list-style-type: none"> <li>- provision of technical advice;</li> <li>- training;</li> <li>- coaching and mentoring addressed to municipal Planning Units or Service Departments.</li> </ul> <p><b>Capacity-building activities</b> will be complemented by <b>pilot quick impact projects</b> aiming to, for instance, designing an urban layout to improve an existing network of streets and roads to better accommodate a higher influx of traffic, or to set up a municipal solid waste sorting plant to better cope with increasing volumes of litter.</p> <p>MASAR project is being implemented by a consortium of European entities: VNG International (the association of municipalities of the Netherlands), the Polish Center for International Aid (Polish acronym PCPM), the Catalan Agency for Development</p>

	<p>Cooperation (Catalan acronym ACCD), and Local Government Denmark (Danish acronym KL).</p> <p>The expert will work with <b>ACCD</b> under direct supervision by the Front Officer in the coastal plain North of Tripoli, including areas within the Governorates of North Lebanon and Akkar. See annex for ACCD's geographical area of intervention</p>
<b>Geographical scope of the assignment</b>	<ul style="list-style-type: none"> <li>• Union of Oussat wa Sahel al Qaytaa, Governorate of Akkar, 14 municipalities</li> <li>• Union of Menieh, Governorate of North Lebanon, 5 municipalities</li> </ul>
<b>Specific background materials</b>	<ul style="list-style-type: none"> <li>- MASAR project reports including profiles of Unions of Municipalities, work plan and logical framework</li> <li>- UN-Habitat reports on Area-based planning, Neighbourhood profiles, and Regional Technical Offices (RTOs)</li> <li>- VNG's '5 Capabilities framework' for local governments, and Toolkit for Municipal Strategic Planning</li> <li>- Other open-access studies and reports</li> </ul>
<b>Aim and scope of this assignment</b>	<p>ACCD is implementing a pilot project to capacitate local governments in Area-Based Planning by combining integrated strategic planning and the establishment of municipal GIS systems with updated cartography and digital database.</p> <p>This project aims to:</p> <ol style="list-style-type: none"> <li>1. Strengthen the resilience and the capacities of the UoMs in dealing with an uncertain environment (notably the protracted displacement crisis), identifying and planning for different <b>scenarios</b>.</li> <li>2. Deepen the understanding and learning on <b>participatory strategic planning</b> as a mechanism to enhance accountability, good governance and trust between institutions and the citizenry.</li> <li>3. Define the basis for a long-term <b>local development strategy</b> with a multi-sectorial, multi-stakeholder approach, considering different scenarios for the future that serves to attract projects and investments.</li> </ol> <p>The UoMs and their municipalities, as governmental institutions, are accountable to their community for the quality of the services that they provide. They have a responsibility to design and deliver services that are efficiently run and appropriate to the needs of their local population. A Municipal Strategic Plan will enable local governments to better design and improve local services to respond to the needs and aspirations of local populations, as well as achieve better value for the resources that they spend. Strategic plan also serves as a roadmap for mid- and long-term development anticipating possible scenarios for the future.</p> <p>Furthermore, local governments have a wider responsibility to promote the economic, social, and environmental well-being of their communities in a context of constant change: a massive influx of Syrian refugees, overwhelmed services, scarce job opportunities, conflicts at community level, economic hardship, etc. The Strategic Plan will address how the local governments and their community envisage to</p>

	<p>improve the quality of life, confidence in institutions, economic prosperity, environmental sustainability, and the general wellbeing of the population.</p> <p>The strategic planning process should be conceived as a <b>learning-by-doing exercise</b> in which capacity-building in good governance, participatory decision making or urban planning is an integral part.</p> <p>The overall objective, therefore, of the strategic planning process is to strengthen <b>good governance</b> practices and democratic values both in the institutions and in the community. Creating a culture of community engagement, transparency and confidence in participation is at the same a means and an end in itself. The success of this intervention depends entirely on the <b>local governments' ownership</b> of the planning process and the resulting strategy. The expert will therefore act as coach/facilitator encouraging stakeholders' leadership.</p>
<b>Key Responsibilities</b>	<p>The expert/firm is responsible for designing and leading the Integrated Strategic Planning exercise as per the following responsibilities:</p> <ol style="list-style-type: none"> <li>1. Review the pre-existed reports and profiles produced by ACCD and update accordingly.</li> <li>2. Map stakeholders and identify key community leaders.</li> <li>3. Align his/her assignment with other pilot project activities of MASAR including coordination with short-term experts under the guidance of ACCD</li> <li>4. Assess capacity-building needs and propose a programme</li> <li>5. Design the strategic planning process</li> <li>6. Act as lead facilitator in the participatory strategic planning exercise including convening meetings, organising workshops and designing all the necessary tools, consultations and participatory methods.</li> <li>7. Identify needs for additional supporting experts and draft their ToR</li> <li>8. Build the capacities of local governments and key stakeholders in: good governance, participatory processes, scenario planning, strategic and development planning.</li> <li>9. Draft the resulting strategic document</li> <li>10. Meet with ACCD team to report on progress and challenges on regular basis</li> <li>11. Draft written reports on activities as described in the next section</li> </ol>
<b>Main activities</b>	<p>To achieve the expected results, the expert will conduct the following activities organised into 7 outputs.</p> <p><b>Output 1: Presentation and desk review</b></p> <ul style="list-style-type: none"> <li>- Conduct introductory workshop with municipalities to present the key concepts of strategic planning and participatory process. Gather needs and preferences.</li> <li>- Identify key stakeholders for both UoM (community leaders, local NGOs, ensuring representation of Syrian community) and conduct initial consultations. Provide a stakeholders mapping for the strategic planning cycle.</li> </ul>

- In-depth desk review of MASAR background documents, 5C toolkit, scenario planning and municipal strategic planning reports
- Draft a report providing an update of “Union profiles” produced by MASAR in mid-2019, particularly in view of socio-economic situation, security, national governance crisis and financial crisis.
- Consult with other short-term experts working for MASAR in assessment/implementation of pilot projects: GIS, solid waste, canal infrastructure, road safety.

#### **Output 2: Training Needs Assessment (TNA)**

- Assess training needs related to participatory strategic planning at 3 levels of participation: 1) mayors and council members (participatory decision-making, good governance principles...); 2) municipal staff and volunteers; 3) selected stakeholders (community leaders, NGOs, business sector, education sector)
- Propose a training curriculum to be integrated into the strategic planning process in a learning-by-doing approach
- Identify the need of additional short-term experts in specialised thematic areas relevant for the strategic planning process such as scenario planning or public policy cycle. Provide a preliminary draft of their ToR.

#### **Output 3: Full action plan of the strategic planning process**

- Having conducted a thorough desk review, consultations and training needs assessment, the expert will produce a detailed action plan of the strategic planning process containing (at least):
  - o governance structure
  - o phases with timeline
  - o methodology
  - o resources
  - o key stakeholders at different levels

#### **Output 4: Governance structure and committees**

- Set up the governance structure: steering committee (mayors), thematic working groups (urban planning, infrastructure, services, economic development...), technical committee and public forum.
- Facilitate sessions of working groups and establish objectives, designate focal points and work methodology, including feedback to technical and steering committees.
- Document meetings and progress in monthly reports.

#### **Output 5: Workshops and on-job trainings**

- Facilitate workshops with municipal members, staff and stakeholders on strategic planning and participatory decision-making covering the following:
  - o Mapping risks and resources, PESTL and SWOT analysis

	<ul style="list-style-type: none"> <li>○ Territorial scenario planning: long-term vision of the area (in connection with GIS technical unit)</li> <li>○ Defining mission, vision and action plan for the UoM</li> <li>- Conduct training sessions as per the training needs assessment</li> <li>- Facilitate public hearings (town-hall meetings) as public reporting mechanism on the elaboration of the strategic plan</li> <li>- Take into consideration MASAR pilot projects in service delivery and local economic development when defining short-, mid- and long-term priorities.</li> </ul> <p><b>Output 6: Strategy formulation</b></p> <ul style="list-style-type: none"> <li>- Compile the conclusions of the working groups, committees and consultations in a final strategic plan</li> <li>- Final document shall include: territory identity and urban policy of the UoM, definition of the priority action lines with key indicators for achievement, identify the different prioritized projects, develop a budget, recommend a implementation mechanism and public feedback.</li> <li>- Organise a public presentation with local stakeholders, regional/national authorities and international development partners.</li> </ul> <p><b>Output 7: Final report</b></p> <ul style="list-style-type: none"> <li>- Besides the deliverables mentioned in the next section, the expert shall submit monthly progress reports which will include as annexes any document produced (training materials, questionnaires, meeting minutes, and so on).</li> <li>- For every meeting/workshop, the expert shall submit a short report and be responsible of collecting participant attendance sheets and other forms – templates to be provided by MASAR.</li> <li>- Challenges or obstacles of any nature shall be communicated to the FO in writing in the shortest delay.</li> <li>- At the end of the consultancy, the expert shall submit a full report of the strategic planning process, with analysis on the learnings, stakeholder dynamics, conclusions and recommendations for public advocacy.</li> </ul>														
<b>Tentative timeline</b>	<p>The whole strategic planning process is expected to last for a maximum of 5 months. As an orientation, an estimation is provided of the expected duration of each output:</p> <table> <tbody> <tr> <td>Output 1: Review</td><td>3 weeks</td></tr> <tr> <td>Output 2: TNA</td><td>3 weeks</td></tr> <tr> <td>Output 3: Full action plan</td><td>2 weeks</td></tr> <tr> <td>Output 4: Governance structure</td><td>2 weeks</td></tr> <tr> <td>Output 5: Workshops</td><td>6-8 weeks</td></tr> <tr> <td>Output 6: Strategy</td><td>2 weeks</td></tr> <tr> <td>Output 7: Final reports</td><td>2 weeks</td></tr> </tbody> </table>	Output 1: Review	3 weeks	Output 2: TNA	3 weeks	Output 3: Full action plan	2 weeks	Output 4: Governance structure	2 weeks	Output 5: Workshops	6-8 weeks	Output 6: Strategy	2 weeks	Output 7: Final reports	2 weeks
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	<b>TOTAL</b> <b>20-22 weeks</b>
<b>Outputs / Deliverables</b>	<p>The expert will draft and submit the following deliverables:</p> <ol style="list-style-type: none"> <li>0. Stakeholder mapping</li> <li>1. Union profile update 2022</li> <li>2. Training needs assessment and proposed curriculum</li> <li>3. Overview of experts needed for participatory strategic planning cycle</li> <li>4. Full action plan</li> <li>5. Report on institutional setup up SP including ToR of committees and WG</li> <li>6. Reports on trainings and workshops</li> <li>7. ToR of additional experts as appropriate</li> <li>8. Monthly progress reports</li> <li>9. Final UoM Strategic plan</li> <li>10. Final report</li> </ol>
<b>Additional supporting experts</b>	<p>The selected lead expert is expected to lead a team taking part in the different parts of the assignment, most notably the stakeholders mapping, participatory workshops and facilitation of committees/stakeholder's interaction. The composition of the lead expert's team will be an integral part of the tender documents and included in the budget.</p> <p>In addition, the expert may resort to external short-term local experts for specific training workshops or other activities. In this case, the lead expert shall submit to ACCD a justification of the need, a draft ToR with estimated duration and budget, and recommend a minimum of 3 candidates. <b>The lead expert will participate in the evaluation and selection of experts.</b> However, ACCD will retain the right to decide on the convenience of external support. Likewise, ACCD will have the right to propose the participation of external experts, local or international.</p> <p>Each additional short-term expert may receive fees up to 2.500 EURO, with a maximum daily rate of 400. The total budget allocated to supporting short-term local experts may not exceed 10.000 EURO.</p>
<b>Reporting and Coordination</b>	<p>The expert will work under the supervision of ACCD's Front Officer and in close collaboration with the project team including but not limited to:</p> <ul style="list-style-type: none"> <li>- Thematic Coordinator for Municipal Planning</li> <li>- ACCD's outreach and participation officer</li> <li>- Other short-term experts working for ACCD</li> <li>- Other short-term experts conducting similar strategic planning exercises for MASAR project partners</li> <li>- Project partners</li> </ul>
<b>Minimum qualifications</b>	<p>The minimum qualifications and skills of the expert are:</p> <p><b>Education:</b></p> <ul style="list-style-type: none"> <li>- Higher education degree (Masters level) in strategic planning, urban planning, political sciences, economics, development or similar.</li> <li>- Postgraduate studies in local governance and participatory processes will be an asset</li> </ul>

**Professional Experience:**

- Minimum of 8 years of experience in strategic planning and development.
- Minimum of 5 years of experience working with local governments in North Lebanon and Akkar
- Extensive knowledge of Lebanese municipal context and development processes and institutions.
- Proficiency in report writing, case studies, and other related documentation.
- Having conducted at least two similar consultancies preferably in Lebanon
- Experience in teaching, training for local governments will be valued.
- Cultural sensitivity and cross-cultural skills (religion, ethnicity, gender).
- Experience in conducting training and preparation of training materials/ curriculum.
- Proficiency in English and Arabic

**Competencies**

- Autonomy, creativity, pragmatism, and orientation towards results;
- Reliability: fulfilling obligations in a highly responsible manner;
- Self-Control and maintaining composure;
- Cultural sensitivity and cross-cultural skills (religion, ethnicity, gender);
- Attention to details, proper information management;
- Tolerance and adaptability.

**Terms and Conditions**

<b>Period of the assignment</b>	April-August 2021 for a total of 75 full working days approximately
<b>Selection</b>	To be eligible for this assignment, the expert will provide ACCD with the following technical and financial proposal as detailed in the tender documents.  ACCD will evaluate the proposal and select the expert accordingly.
<b>Location of the Assignment</b>	North Lebanon: Menieh Union of Municipalities Akkar: Oussat wa Sahel al Qaytaa Union of Municipalities
<b>Relevant contact details</b>	Enric Ibarz (ACCD Front Officer, Tripoli): +961 81019480 Nicole Szaroletta Ochando (Project manager, Barcelona) :+34607690727