

## Assignment / Terms of Reference

### National Expert in Strategic Planning

<b>Position description</b>	
<b>Function</b>	National Expert in Strategic Planning - LEBANON
<b>Name</b>	
<b>Activity name</b>	Output 1.2: Spatial planning is designed and provides concrete logic for sustainable municipal service delivery and municipal investment Ref activity plan SO1: Project DU1/1.5 Budget line: 5.5.2
<b>Project background</b>	<p>MASAR for Local Governments is a programme funded by the EU MADAD trust fund and implemented in Lebanon and Iraq. The overall aim of the programme is to strengthen the long-term resilience of targeted subnational governments and their host, refugee and IDP populations to deal with displacement.</p> <p>MASAR has three objectives:</p> <ul style="list-style-type: none"> <li>- To improve the capacities of subnational governments to engage in holistic, area-based planning and consider different scenarios that respond to the needs of host, refugee and IDP populations.</li> <li>- To improve service delivery to generate greater social stability outcomes based on the needs of host, refugee and IDP populations.</li> <li>- To empower subnational governments and service providers to facilitate local economic development and to have better access to municipal investment that benefit the extension of safe public services and create economic opportunities for host, refugee and IDP populations.</li> </ul> <p>In Akkar, Lebanon, MASAR supports three Unions of Municipalities: Dreib el Gharby, Dreib el Awsat, and Akkar El Chemali.</p>
<b>Specific background materials</b>	<ul style="list-style-type: none"> <li>- MASAR information package provided by PCPM, including MASAR inception report, 5C toolkit, and reports from relevant consultancies on local economic development and GIS;</li> <li>- Briefing and materials provided by the relevant experts employed under MASAR programme in the Dreib region (e.g. GIS expert or experts in service delivery)</li> </ul>

<p><b>Aim of this assignment</b></p>	<p>The overall <b>aim</b> of the assignment is to strengthen democratic governance and good local governance capacities, as well as increase the local governments' preparedness for the possible future challenges and opportunities. The interventions should encourage culture of synergy and community engagement through consolidating participatory approach in the municipal planning exercise. Community involvement, relevance of response to the territorial needs, reliance on evidence and introducing innovative tools in identifying and managing projects should constitute the main aims of the planning process.</p> <p>In relation to this assignment, Strategic Planning is understood as a tool to realise the mission and development vision of local governments (here: Dreib Unions of Municipalities). As the MASAR Inception Report indicates, the Expert should aim at "development of a longer-term strategic plan" for the area of intervention, integrating "multi-sectoral urban infrastructures and services in a longer-term vision." The plan should result "in a spatial planning framework, including a list of possible options to develop and coordinate infrastructure and service delivery." The process should be lead by the Unions of Municipalities and moderated by the Expert.</p> <p>The Expert's <b>approach</b> should combine:</p> <ul style="list-style-type: none"> <li>- participatory approach,</li> <li>- multisectoral approach,</li> <li>- stakeholders mapping and analysis,</li> <li>- risk and resources mapping and</li> <li>- local development approach.</li> </ul> <p>Moreover, the Expert should build on the achievements of the MASAR project and integrate the MASAR priorities into his/her assignment.</p> <p>The strategic planning process should be thought of as a learning-by-doing exercise and build the capacities of local governments and community leaders in the following <b>fields</b>:</p> <ul style="list-style-type: none"> <li>- strategic planning and decision-making for area-based planning and service delivery,</li> <li>- urban scenario planning for longer-term strategic vision.</li> </ul> <p>As a result of the assignment, Dreib Unions of Municipalities should be equipped with a strategy and action plan suitable for immediate implementation .</p>
<p><b>Key Responsibilities</b></p>	<p>The Strategic Planning Expert will:</p> <ol style="list-style-type: none"> <li>1) assess training and organisational (systems/structures) needs related to strategic planning and decision making among local governments representatives and local leaders of Dreib;</li> <li>2) align his/her assignment with complementary activities in the area through consultations with the relevant experts (especially in GIS implementation, local economic development, and road safety) and a review of relevant materials (e.g. studies related to planning, public services and local economic development conducted in the area);</li> <li>3) build local governments' and local leaders' capacities in strategic planning and decision making through:             <ul style="list-style-type: none"> <li>- preparatory trainings (if necessary);</li> </ul> </li> </ol>

	<ul style="list-style-type: none"> <li>- the strategic planning process itself;</li> <li>- three kinds of workshops (as specified in Activities and Outputs);</li> <li>- recommendations of resources for further study for the activities' participants.</li> </ul> <p>4) moderate the strategic planning process:</p> <ul style="list-style-type: none"> <li>- lead the elaboration of the strategy for the Dreib Unions based on the participatory formulation of the strategic orientation and choices integrating also the MASAR priorities;</li> <li>- prepare an action plan of a multi-stakeholder strategic planning process suitable for the use by the Dreib Unions;</li> <li>- set up the governance model and implementation structure;</li> <li>- summarize and validate the achievements of the planning process;</li> <li>- elaborate M&amp;E modalities for the implementation of the action plan;</li> <li>- provide recommendations for the implementation phase, including recommendations for hiring capacity building experts for the needs of local governments.</li> </ul> <p>5) Report the consultancy as specified in reporting requirements.</p>
<p><b>Main activities</b></p>	<p>To deliver the outputs, the Strategic Planning Expert will conduct the following activities:</p> <ol style="list-style-type: none"> <li>1) Training and organizational needs assessment <ul style="list-style-type: none"> <li>- assess training and organizational needs related to strategic planning and decision making among the Dreib Unions' representatives, local leaders and local organizations' representatives identified jointly by the Dreib Unions and PCPM, considering objectives of MASAR as well as the mandate of the Unions;</li> </ul> </li> <li>2) Consultations with experts and desk research <ul style="list-style-type: none"> <li>- Consult experts conducting complementary interventions and review of relevant materials, following PCPM recommendations;</li> </ul> </li> <li>3) Training curricula and resources <ul style="list-style-type: none"> <li>- Elaborate training curricula and complete training resources based on the training needs assessment and the consultations;</li> </ul> </li> <li>4) Structural set-up and supervision of the planning process <ul style="list-style-type: none"> <li>- Organize participants of the strategic planning process facilitating the appointment of the steering committee (including mayors and local community representatives), thematic groups (agriculture, urban planning and infrastructure, public services, economic development, etc.) and a technical unit including a team of experts needed for the strategic planning process;</li> <li>- Supervise working groups and facilitate cooperation between them;</li> <li>- Summarize and validate the main achievements of the process during a closing session of the planning process.</li> </ul> </li> <li>5) Workshops <ul style="list-style-type: none"> <li>- Conduct workshops with Dreib Unions' representatives and staff in strategic planning and decision making. The workshops should cover the following topics: <ul style="list-style-type: none"> <li>o mapping out resources, liabilities, risks and opportunities;</li> <li>o urban scenario planning for longer-term strategic vision;</li> </ul> </li> </ul> </li> </ol>

	<ul style="list-style-type: none"> <li>○ workshops devoted to the elaboration of the draft strategy and action plan for its implementation;</li> </ul> <p>6) Draft map of resources</p> <ul style="list-style-type: none"> <li>- Based on the results of the workshops, prepare a draft map of resources covering resources, liabilities, opportunities, and risks in the studied area.</li> </ul> <p>7) Strategy and action plan</p> <ul style="list-style-type: none"> <li>- Based on the results of the workshops, elaborate a strategy and action plan feasible for immediate implementation; the strategy should be ready for publication and dissemination;</li> </ul> <p>8) Report from consultancy</p> <ul style="list-style-type: none"> <li>- Report his/her consultancy in accordance with Reporting requirements .</li> </ul>
<p><b>Outputs / Deliverables</b></p>	<p>The SP Expert will provide to the Front Officer the following outputs/deliverables:</p> <ol style="list-style-type: none"> <li>1) Training and organizational needs assessment;</li> <li>2) Consultations with experts conducting complementary interventions (particularly GIS experts) and review of relevant materials related to the interventions;</li> <li>3) Training curricula and materials for: <ul style="list-style-type: none"> <li>- strategic planning and decision making as well as</li> <li>- urban scenario planning for longer-term strategic vision;</li> </ul> </li> <li>4) Structural setup and supervision of the strategic planning process;</li> <li>5) Workshops in: <ul style="list-style-type: none"> <li>- mapping out resources, liabilities, risks and opportunities – at least one training session in each of the three Dreib Unions should be conducted (at least 3 sessions);</li> <li>- urban scenario planning for longer-term strategic vision – at least one training session in each of the three Dreib Unions should be conducted (at least 3 sessions);</li> <li>- workshops devoted to the elaboration of the draft strategy and action plan for its implementation – at least one training session in each of the three Dreib Unions should be conducted (at least 3 sessions);</li> </ul> </li> <li>6) Draft map of resources, liabilities, opportunities and risks elaborated as a result of workshops with the Union’s representatives and staff;</li> <li>7) Strategy and action plan for its implementation for each of the Unions of Municipalities, feasible for immediate implementation, and ready for publication;</li> <li>8) Report on the consultancy.</li> </ol> <p><i>Additionally, if the Expert decides to make use of the budget for supporting local experts (see: Additional budget), he/she will be required to provide written recommendations for hiring Supporting Local Experts, including recommendations on qualifications of experts, costing, scope of responsibilities and deliverables.</i></p>
<p><b>Reporting requirements</b></p>	<ul style="list-style-type: none"> <li>- Training needs assessment note (in English);</li> <li>- Note on consultation with experts conducting complementary interventions (particularly GIS) and desk research conducted (in English);</li> <li>- Training curricula (in English and Arabic) and resources (in Arabic);</li> <li>- Presentation for the participants of the strategic planning process summarizing the achievements and including the draft map of resources</li> </ul>

	<p>(deliverable 6) as well as draft strategy and action plan (deliverable 7) (in English and Arabic);</p> <ul style="list-style-type: none"> <li>- Development strategy for each of the Unions of Municipalities, validated with participants of the planning process and ready for publication and dissemination (in English and Arabic);</li> <li>- Brief report on the consultancy covering: training curricula, dates, places and participants, list of training materials (e.g. presentations) and recommended resources for further study resources (in English).</li> </ul> <p><i>Additionally, if the Expert decides to make use of the budget for supporting local experts (see: Additional budget), he/she will be required to prepare a brief note on cooperation with the supporting expert covering the scope and assessment of support received.</i></p>
<p><b>Coordination</b></p>	<p>Throughout his/her assignment, the Strategic Planning Expert will cooperate with:</p> <ul style="list-style-type: none"> <li>- Dreib Unions' representatives, staff and local leaders – to identify questions and problems, which are within the mandate of the Unions and relevant to the MASAR project objectives, to be analysed during the training sessions;</li> <li>- Experts working on the development of planning capacities of the Dreib Unions – to ensure synergy between trainings in strategic planning and other capacity building interventions under MASAR;</li> <li>- PCPM's Front Officer, Project Manager, Thematic Coordinator, and Focal Point Officer, who will introduce the Strategic Planning Expert to the MASAR project as well as support him/her in coordination tasks.</li> </ul> <p><i>Coordination between the Strategic Planning Expert and the local governments' representatives, local community members and experts working on complementary interventions shall be arranged by PCPM.</i></p>
<p><b>Additional budget</b></p>	<p>The Strategic Planning Expert will have a possibility to indicate Short-Term Experts (STE) to be hired by PCPM to support the planning process. An SLE can be hired only under the following conditions:</p> <ul style="list-style-type: none"> <li>- An STE to be hired is a specialist in a field which is directly related to the strategic planning process,</li> <li>- A terms of reference (PCPM template) for the STE is prepared by the Strategic Planning Expert;</li> <li>- No less than 3 suitable candidates for the position are proposed by the Strategic Planning Expert;</li> <li>- PCPM Front Officer approves the documents and seeks the approval of MASAR Team Leader;</li> <li>- Upon the approval of the Team Leader, PCPM proceeds with the hiring;</li> <li>- The total gross remuneration of the STE does not exceed EUR 2500 (gross), whereby the STE can receive no more than EUR 377 (gross) per a full day of work.</li> </ul> <p>The ToR as well as the contact list should be shared with PCPM Front Officer no later than 10 days before the planned engagement of the supporting local expert.</p>

	The overall budget for STEs supporting the strategic planning process is EUR 10 thousand (gross).
<b>Covid-19 precautions</b>	The Strategic Planning Expert will realize all the activities following safety instructions regarding prevention of Covid-19 spread. The instructions will be provided by PCPM. In case of a lockdown, the SP Expert will be working remotely and will conduct the training via internet.
<b>Minimum qualifications</b>	<p>1) Education:</p> <ul style="list-style-type: none"> <li>- Higher education degree (Masters level or higher) in Local or Rural Development, Economics, Urban Planning, Sociology or similar.</li> <li>- At least 5 years of experience in rural or local development projects or consultancy to local and regional authorities;</li> <li>- At least 3 years of experience as trainer on topics related to strategic planning, local development or local governance;</li> <li>- At least 2 similar assignments in the last 5 years, preferably in Lebanon;</li> <li>- Sound knowledge of the principles of participatory policymaking as well as strategic planning;</li> <li>- Extensive knowledge with Lebanese municipal context and development processes and institutions;</li> <li>- Cultural sensitivity and cross-cultural skills (religion, ethnicity, gender);</li> <li>- Proficiency in English and Arabic.</li> </ul> <p>2) Competencies:</p> <ul style="list-style-type: none"> <li>- Reliability: fulfilling obligations in a highly responsible manner;</li> <li>- Self-control and maintaining composure;</li> <li>- Attention to detail, proper information management;</li> <li>- Tolerance and adaptability.</li> </ul>
<b>Terms and Conditions</b>	
<b>Period of the assignment</b>	<p><b>90 days (person-days) over the period of 5 months from the signature of the contract</b>, whereby:</p> <ul style="list-style-type: none"> <li>- The following preparatory activities: desk research, capacity building needs assessment, and elaboration of training curricula and resources, will not take more than 10 days;</li> <li>- Activities not involving participation of local governments' representatives or community leaders (assessment report, report from consultancy, or assistance in hiring supporting local experts) will not take more than 15 days.</li> <li>- Stages of the strategic planning process will be carefully timed by the Expert bearing in mind that the process should be concluded within the indicated timeframe.</li> </ul>
<b>Assignment Place</b>	Akkar, Dreib Area (3 Unions of Municipalities – UoMs).
<b>Relevant contact details</b>	<ul style="list-style-type: none"> <li>- Front Officer, Dominika Michalak: <a href="mailto:dmichalak@pcpm.org.pl">dmichalak@pcpm.org.pl</a></li> <li>- Project Manager, Joanna Byszewska-Zapletal: <a href="mailto:jbyszewska@pcpm.org.pl">jbyszewska@pcpm.org.pl</a></li> <li>- Thematic Coordinator, Pascale Beainy: <a href="mailto:pbeainy@pcpm.org.pl">pbeainy@pcpm.org.pl</a></li> </ul>