

# CALL FOR EXTERNAL EXPERT TO SUPPORT WBF IN UPDATING THE STRATEGIC PLAN

· WESTERN BALKANS FUND ·

**Request issued:** 26/04/ 2024

**Deadline for application:** 20/May/ 2024

**Open for:** Western Balkan Citizens and beyond

**Work Station:** Remote and WBF Secretariat, Tirana, Albania.

## ABOUT WESTERN BALKANS FUND

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Western Balkans Fund (WBF) is an international inter-governmental organization established by the Western Balkans contracting parties (Albania, Bosnia-Herzegovina, Kosovo \*, Montenegro, North Macedonia and Serbia). The main purpose of the WBF is to promote regional cooperation and strengthening of the relations between contracting parties, the promotion of common values between citizens, civil society, and institutions of the region, trying to strengthen cooperation and people to people contacts. The Fund aims to achieve these goals by supporting common regional projects and by bringing people to share mutual experiences, values, and culture in these key areas:

- Education and Scientific exchanges.
- Cultural cooperation.
- Sustainable Development.

The WBF has successfully executed its first Strategic Development Plan for the period 2019 - 2024 and as the current strategic plan nears its conclusion, and is ready to update its Strategic Development Plan also outline its strategic direction for the next five-year period (2025-2030). The WBF is in search of External Expertise that will support the team to update the Strategic Development Plan (hereinafter referred to as "Consultant"). The Consultant's role is to collaborate closely with the WBF to review the achievements and shape a roadmap for the future actions aligned with identified indicators of the WBF MEL framework. Throughout the implementation process of this assignment, the Consultant is expected to maintain open communication channels with the WBF Secretariat, ensure alignment with organizational objectives and values, whereas regular reporting and participation in WBF meetings will ensure transparency and accountability.

It is envisaged that the Consultant is expected to perform her/his/their/theirs duties according to the following framework:

1. The Consultant will engage with the WBF to establish mutual understanding regarding workplans, timeframes, methodologies, and data assessment approaches.
2. Guided by an agreed methodology, the Consultant in close consultation with WBF will develop the next five-year Strategy and Implementation Plan.
3. An inclusive approach for the accomplishment of this assignment is a *must* and recognizing the importance of human rights and gender equality, the Consultant will integrate these principles into the Strategy's targets, baselines, and indicators.
4. Facilitating meetings, participatory sessions and workshops, the Consultant will gather insights and perspectives from WBF and its stakeholders, fostering consensus and ownership of the strategic direction.

The Consultant is expected to perform according to the suggested scope of the work framework developed in accordance with WBF; however, the Consultant may suggest their own methodology.

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<sup>1</sup> This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

## SCOPE OF ASSIGNMENT

*\*Candidates are encouraged to follow these steps when they develop the working methodology*

The preparatory phase begins with gaining in-depth understanding of the WBF's scope of work, existing SD plan and its statutory requirements that further set the stage for strategy development process. This involves diving into regional cooperation dimensions through a comprehensive analysis to enhance better understanding of the desired position of the WBF in the region. WBF, as key stakeholder plays a fundamental role in the development of this strategy and include stakeholders in this assignment through participatory sessions to validate defined strategic path for next five years.

- The Consultant is expected to develop and agree with the WBF, on detailed methodology of the strategy designing process together with the Implementation Plan.
- The Consultant will develop an operational plan including activities, expected results and success indicators which will be included in the final report as a deliverable.
- The Consultant is expected to perform desk research<sup>2</sup> and may include rounds of interviews (offline and/or online depending upon methodology offered) with WBF stakeholders to understand the current trends and draft a list of potential ideas for WBF's strategic path. Based on the internal data provided by WBF, the Consultant will compare the trends to assess WBF's impact on the regional agenda, moreover, suggest actions to be taken by WBF that further strengthen regional cooperation.
- The Consultant in close cooperation with WBF Secretariat is expected to coordinate and facilitate consultative sessions<sup>3</sup> regarding defined strategic objectives and to obtain real-time information and discuss scenarios for improving regional cooperation in the Western Balkans.
- The Consultant is expected to provide input to the list of invitees to be part of these sessions per Contracting Party and will collect information which will be reflected in the meeting minutes to be submitted to WBF.
- The Consultant is expected to develop the draft of the WBF Strategy and present to the WBF Council of Senior Officials<sup>4</sup>, and support WBF Secretariat in preparing the presentation of the draft and collect feedback, also make sure that feedback is reflected in the next draft document.
- The Consultant is expected to develop and provide the WBF with monitoring indicators linked with Strategic and Organizational Development Objectives.
- The Consultant is expected to **elaborate a short version of the Strategy** for printing and submit it to WBF for approval.
- The Consultant is expected to submit the final draft of the strategy together with the report with clear description of fulfilled tasks and achieved results, including recommendations on the next steps for implementation.

## DELIVERABLES

1. Operational plan with scheduled activities and methodology to be taking place during the development process.
2. Inception Report capturing the accomplished tasks and outlining the next steps which will serve as a guiding document, providing a roadmap for the strategy development.
3. Workshop materials for the participatory sessions with stakeholders to encourage active participation and diverse perspectives, fostering consensus on the strategic direction.
4. Strategic Plan together with strategic measurable indicators.
5. A short version of the Strategy for printing was prepared by the Consultant and approved by WBF.
6. The final report with all the results of the assignment was prepared by the Consultant and approved by WBF.

## MONITORING / REPORTING REQUIREMENTS

The Consultant is expected to work under the overall guidance of the WBF Secretariat. The consultant, it is expected to regularly meet with Senior Programme Manager and Monitoring and Evaluation Officer also participate in WBF meetings (by Skype, ZOOM) and share his/her/their/their work progress. Moreover, the consultant must provide one Inception Report and one Final report - in accordance with the operational plan. Reports will include work progress, as well as issues to be addressed, while the Final Report will include the implementation plan, lessons learned, and recommendations.

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<sup>2</sup> \*Potential scope of analysis may be PESTEL or SWOT, up to the Consultant to decide.

<sup>3</sup> \*In cases when Consultant believes that working groups sessions can be conducted online, any replacement of the meeting with a similar one in remote mode (online) should be approved by WBF in advance. If the remote mode is applied, all the video records of these sessions should be submitted to WBF.

<sup>4</sup> Council of Senior of Officials consists of Senior Officials from the Ministries of Foreign Affairs of the Contracting Parties or other duly appointed representatives.

## TIMEFRAME AND COORDINATION

- This assignment is expected to commence at the latest by May 2024 and completed by October 2024.
- Face-to-face work with WBF in Tirana is desirable.
- WBF has allocated 30 working days in total for this assignment.

## COMPETENCIES

- ✓ The candidate should demonstrate and promote the highest standard of integrity, impartiality, fairness, and incorruptibility in all matters affecting his/her work and status.
- ✓ The candidate shall have the ability to lead formulation, design, oversight of implementation, monitoring and evaluation of development projects including the ability to lead strategic planning, change processes and reporting.
- ✓ The candidate shall possess the ability to develop and empower people including coaching and mentoring skills.
- ✓ The candidate should be able to act as a team player and facilitate teamwork.
- ✓ The candidate should be able to facilitate and encourage open and effective communication within the team.
- ✓ The candidate should be able to deliver verbal/written information in a timely, clear, and be organized and easy-to-understand manner; also has the responsibility and accountability for the quality of the outcome of his/her/their/theirs decisions.
- ✓ The candidate shall demonstrate integrity by modelling the WBF's values and ethical standards and treat all people fairly.

## REQUIRED SKILLS AND EXPERIENCE

- At least Master's /Specialist degree in Management, Law, Marketing, Economics, Political and Social Science or other related fields.
- At least 5 (five) years of proven experience in facilitation of strategy development, relevant implementation plans and monitoring and evaluation plans (samples of at least 2 (two) such relevant documents are to be provided, links are acceptable).
- Proven experience with supporting civil society organisations in the growth process.
- Proven experience in / or with multilayered organisations or international organizations.
- Proven experience with grant making and grant giving organisations.
- Proven experience with civil society organizations desirably in regional context.
- Fluency in English is mandatory. Working knowledge of local languages of the WB region is an advantage.

## APPLICATION PROCESS

All interested candidates should submit the application via e-mail on [info@westernbalkansfund.org](mailto:info@westernbalkansfund.org) no later than 20/05/2024.

Application package should include:

- Personal CV including information on experience in similar projects / assignments and contact details for referees with.
- CV should include at least 2 (two) samples of elaborated strategies of communities, relevant implementation plans and monitoring and evaluation plans – which can be included with links.
- Offeror's Letter to WBF confirming Interest with Financial Proposal.
- At least 2 (two) recommendation letters from previous employers and/or clients confirming the relevant work experience.

## FINANCIAL PROPOSAL

- The financial proposal shall specify a *total lump sum amount*, and payment terms around deliverables.
- The applicant shall include a financial proposal that contains a breakdown of the lump sum amount.
- The Consultant is responsible for all personal administrative expenses associated with this assignment, including office accommodation, printing, stationery, telephone and electronic communications, and report copying.
- The Consultant shall cover travel costs that include travel to join duty station/return travel. In general, WBF does not accept travel costs exceeding those of an economy class ticket. Should the Consultant wish to travel in higher class, he/she/they/them should do so using their own resources. In cases of unforeseeable travel, payment of travel costs including tickets, lodging and terminal expenses should be agreed upon, between the WBF and consultant prior to travel, and can be reimbursed.

## SUGGESTED PAYMENT SCHEDULE

The WBF will pay the negotiated amount in two tranches according to the following payment schedule:

1. the first payment upon completion of Deliverables 1,2 & 3 and approval of the Operational Plan and Inception Report (30% of total contract amount).
  2. the second payment upon completion of all Deliverables and approval of the Report (70% of total contract amount).
- Payments are based upon deliverables, i.e. upon delivery of the services specified in TOR.

## EVALUATION METHOD

Contract award shall be made to the candidate whose offer has been evaluated and determined as:

- a) responsive/compliant/acceptable, and
- b) having received the cumulative highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.
  - Technical Criteria weight: 70%
  - Financial Criteria weight: 30%

Only candidates obtaining a minimum of 70% from the maximum available technical score (49 points) are considered for the Financial Evaluation. The maximum number of points assigned to the financial proposal is allocated to the lowest price proposal and will be equal to 30. All other price proposals will be evaluated and assigned points, as per below formula:  $\frac{30 \text{ points [max points available for financial part]} \times [\text{lowest of all evaluated offered prices among responsive offers}]}{[\text{evaluated price}]}$ . The proposal obtaining the overall cumulatively highest score after adding the score of the technical proposal and the financial proposal will be considered as the most compliant offer and will be awarded a contract.