



**PLAN**  
INTERNATIONAL



**CONSULTANCY TERMS OF REFERENCE**



## REQUEST FOR QUOTATION RFQ FY23 – 140 HARVESTING PARTNERSHIP PRACTICES FOR LEARNING

Main Facts Table	
RFQ reference	RFQ FY23 – 140 Harvesting Partnership Practices for Learning
RFQ launch date	5th December 2022
Contract Manager	Jenny Shotton
<b>Deadline for submission of offers</b>	<b>Monday 2<sup>nd</sup> January 2023</b>

Submission of offers to [procurement@plan-international.org](mailto:procurement@plan-international.org)

Please include the RFQ reference “RFQ FY23 – 140 Harvesting Partnership Practices for Learning” in all correspondence

## 1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And it's girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 75 years, and are now active in more than 70 countries.

Read more about Plan International's Global Strategy: All Girls Standing Strong Creating Global Change at <https://plan-international.org/strategy>

### About the commissioning office

This consultancy is commissioned by Plan International Global Hub, Plan Limited, which has overall accountability for delivery excellence across Plan International, in line with our global strategy.

## 2. Background/Context

Plan International's updated global strategy *All Girls Standing Strong Creating Global Change (2022-2027)* emphasizes that working with and through partners is critical to achieving the goal of impacting positively the lives of 200 million girls over the next five years. With a global priority to increase our impact and strengthen the legitimacy of Plan International as a leader in gender-transformative change, a key pillar of the new strategy focuses on evolving into an organisation which is "locally-led, and globally connected". This is interlinked with advancing the quality of our programming and influencing work in partnership with others and through strengthening civil society. Our new global strategy further draws out specific areas of our work which highlight the importance of developing context-specific and flexible partnering approaches, such as scaling up humanitarian work and working with young people as agents of change.

Our global guidance [Building Better Partnerships](#) functions to establish a common understanding across Plan International of our approach to partnership across all contexts where we work. It outlines principles for working with partners and details key steps for good partnership management. However, the essential element for effective partnership practices and realising the ambition of principled and equal partnering relationships depends upon people: our values, mindset, capabilities and actions and our continued learning and reflection in relation to our work with others.

As Plan International's partnership work evolves in complexity and increases in volume, we continue to develop our thinking on what it takes to partner well, and equitably, with diverse organisations, and to support civil society. We are learning how to adapt our structures and advance our processes and practices to strengthen programming and influencing in pursuit of gender-transformative change and have many interesting innovations and learnings on working well with others, which we wish to capture for the benefit of the wider organisation and our partners.

The purpose of this project is to identify notable innovations, successes and challenges in relation to Plan International's partnership practices and learnings and to document these as engaging case studies and knowledge products.

The focus of the project will be on countries where we deliver programming and influencing work. Examples may be identified from any of the four regions where Plan International works and may also involve unpacking the dynamics of multi-level consortium partnerships.

The project time period is anticipated to be 6 months, with all work expected to be completed by 30 June 2023.

## 3. Description & Objectives

## Purpose

The purpose of the consultancy is to **harvest organisation practices for learning around civil society strengthening and partnerships** so that Plan International, and our partners, can benefit from collective learnings on good practices and learnings in relation to these areas and strengthen our ways of working. The consultancy will identify and develop engaging and informative case studies and knowledge products on the experiences of Plan International country offices or programmes, and partners, working with partnership and civil society strengthening approaches.

Specifically, the consultancy will:

1. Review and identify notable and relevant: results/success stories, processes, lessons learned, innovations and emerging good practices and gaps that require further support, in line with Plan International's strategic ambitions to partner equitably and effectively work to strengthen civil society
2. Develop and present 12 engaging case studies/ knowledge products with information collected through a desk review, as well as quantitative and qualitative methods of primary data collection (through engagement with at least 4 countries, where possible this will be in person).

### Topics we are interested in:

Through ongoing feedback and reflection, some topics of interest have already been discussed internally. These include (but are not limited to):

#### **Managing partnership relationship issues. For example:**

- Unplanned partnership exits due to external context changes
- Breakdown of relationships due to poor expectation setting and partnership management
- Addressing critical issues with partners e.g.s, safeguarding, fraud and financial mismanagement

#### **Developing internal structures and processes to be effective at partnering. For example:**

- Adjusting internal administrative processes to reduce barriers in partnership
- Creating processes to build internal cross team accountability for working in partnership and improving internal ways of working together for partnership management and oversight
- Effective internal decision-making (portfolio review and prioritization processes)

#### **Working to support and strengthen civil society through good partnering practices: For example:**

- Maximizing partner capacity strengthening with limited resources
- Partnering with youth and human rights-based organisations in shrinking civic space (including, balancing relationships with governments, roles of different actors, visibility of collaborations, how to work safely together)
- Effective participation and representation of local partners, including young people, in the governance and management of consortium partnerships

#### **Adapting ways of working to collaborate effectively with diverse partners in different contexts. For example:**

- Working with duty bearers (effective participation, ethics, and due diligence, managing partnership governance)
- Working effectively with partners of different sizes, including larger organisations
- Managing power dynamics within a partnership
- Developing partnerships in rapid and uncertain emergencies i.e. Ukraine crisis
- Partnering with non-traditional organisations

**The final topics to develop into case studies and knowledge products will be determined following a desk review and consultation with key stakeholders.**

## Methodology

The consultancy will have a specific focus on developing clear, concise and engaging case study and knowledge product materials, which can be used as both standalone examples, and applied within online and in person interactive and engaging learning activities. The consultant will conduct a desk-based review of Plan International's existing guidance and case study materials and review selected programming and operational knowledge products which draw out partnership and civil society strengthening approaches and learnings. Colleagues from across Plan International, and partner organisations will be consulted and interviewed to gather relevant content to be incorporated in the final product

and provision will be made for in-person gathering of materials through travel to selected country offices where feasible. It is expected that all involved stakeholders will be offered the opportunity to provide feedback and comments on the case studies/ knowledge products before final sign off. The consultant will be responsible for ensuring all work is carried out in line with Plan International's Code of Conduct. All methodologies, approaches and content developed throughout the consultancy will be proposed by the consultant and reviewed by the technical oversight team established by Plan International, composed of programming and operational staff.

The consultant is encouraged to incorporate visual and other creative methods in the presentation of case study material, as appropriate and agreed with the team. It is therefore anticipated that the case studies/ knowledge products will take two main formats:

1. Digital media products to integrate into partnership learning and training materials, including photo stories and video footage
2. Case studies, process documentation and other written presentational learning formats, supplemented by photography, diagrams and illustrations as appropriate

## Users

The users of the knowledge products used as a result of this consistency will include Plan International staff and office and partner organisations. Where relevant, information gathered via the case studies may be used to evidence Plan International's partnership and civil society strengthening work to donors and peer organisations/ wider stakeholder groups.

## Management Arrangements

The consultant will be identified and contracted by Plan International. Plan International will be responsible for overall management. The consultant will be managed by the Global Lead Civil Society Strengthening and Partnership Development.

## Technical Reference Group

A technical oversight team consisting of a small number of staff whose work is connected to partnership strengthening will provide support to the consultant and be responsible for signing off key deliverables. Specifically, the technical reference group will support the consultant in the following ways:

- Identify key stakeholders to engage in this work
- Provide support to the consultant by sharing key resources and materials
- Provide feedback, comments, and edits to relevant drafts of key deliverables
- Be available for monthly meetings (as a minimum) to feedback on progress, discuss content, issues and approaches

## Selection of Case Studies and Engagement of Key Stakeholders

During the inception phase, the technical team and consultant will discuss and prioritise the issues to be documented, the format of the learning product and a timeline. The consultant is expected to work directly with stakeholders including those in leadership roles, and working in programmes, influencing and operations in countries across the four regions where Plan International operates and where we conduct the majority of our programming and influencing work. S/he is also expected to consult with key stakeholders within our National Organisations, in order to gather information for case study/ knowledge product development. Introductions to key stakeholders and discussions around the feasibility/ logistics of in-country visits will be explored during this time and the final selection of key stakeholders (and topics) will be made during the inception phase by the technical team, following discussion with the consultant. The Plan International technical team will facilitate initial introductions to key stakeholders however the consultant is expected to generally work independently to schedule meetings and activities necessary for the fulfilment of the consultancy.

It is important to Plan that partners are also engaged in steering aspects of this work. The consultant should propose a suitable mechanism for meaningful engagement of partners in this project in their proposal submission

## 4. Deliverables and Timeline

### Key Deliverables

#	Deliverables	Format and length	Due	Detail
1	Phase 1 plan and presentation, including: - Updated timeline - Methodology/ workplan - Initial recommendations for case studies/ knowledge products based on analysis of current documents and initial consultation	12-page report + 10 slide (max) presentation	By 31 January 2023	<i>For technical team and to be used as a communication tool for participating offices In English</i>
2	Phase 1: 6 case studies and knowledge products	Written, with photographs/ graphics (max. 4 pages per written document)  And/or video/ digital media products (max.3 mins per product)	By 31 March 2023	<i>In English</i>
3	Phase 2: 6 case studies and knowledge products	Written, with photographs/ graphics (max. 4 pages per written document)  And/or video/ digital media products (max.3 mins per product)	By 31 May 2023	<i>For internal teams and as a communication tool for offices</i>

**Note:** In the event that there is a change or additional deliverables during the contract period, an addendum to the contract must be agreed and signed. The change/additional deliverables must be in line with the initial scope of the project.

### Duration and timeline

The consultant will be contracted for a total of 40 days, between the period of January 2023 and June 2023.

Activity	Time	Days of work	Responsible	Individuals involved
<b>Phase 1: Jan to March</b>				
Inception meetings, initial desk review, interviews with key staff, develop inception report and presentation	By 31 January 2023	6.0	Consultant	Technical team, identified key stakeholders
Presentation and feedback session of inception report and plan with technical team	By 31 January 2023	0.5	Consultant	Technical team
Collect case study/ knowledge product information via <ul style="list-style-type: none"> <li>In-depth interviews</li> <li>Document desk review</li> <li>In-person visit to country office</li> </ul>	February-March 2023	8	Consultant	Country offices/ partners/ other key stakeholders (technical team as needed)
Write up and submission of drafts of 6 case studies/ knowledge products	By 15 March	5	Consultant	N/a
Feedback/ validation of case study/ knowledge product contents with technical team and key stakeholders and revisions	By 23 March	3	Consultant	Technical team/ key stakeholders
Submission of final versions of 6 case studies and knowledge products to Plan	By 31 March	0.5	Consultant	Technical team

(Plan will subsequently translate these materials)				
<b>Phase 2: April to June</b>				
Review and update plan with technical team	By 15 April 2023	0.5	Consultant	
Collect case study/ knowledge product information via <ul style="list-style-type: none"> <li>In-depth interviews</li> <li>Document desk review</li> <li>In-person visit to country office</li> </ul>	April-May 2023	8	Consultant	Country offices/ partners/ other key stakeholders (technical team as needed)
Write up and submission of drafts of 6 case studies/ knowledge products	By 15 May 2023	5	Consultant	N/a
Feedback/ validation of case study/ knowledge product contents with technical team and key stakeholders and revisions	By 23 May	3	Consultant	Technical team/ key stakeholders
Submission of final versions of 6 case studies and knowledge products to Plan (Plan will subsequently translate these materials)	By 31 May 2023	0.5	Consultant	Technical team

**Note:** This timeline is indicative and is intended to support prospective consultants in the development of their proposals. As part of the process, this timeline will be re-evaluated in consultation between Plan International and the consultant.

## 5. Budget

Plan International follows a fair Procurement process and does not divulge our budgets. Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

### Table of Payment Schedule

Milestone	Detail	Amount to be paid (%)	Expected Timeframe
Inception report and presentation	12-page report (max) + 10 slide (max) presentation	20%	By 31 January 2023
Submission of Phase 1 case studies/ knowledge products	6 case studies/ knowledge products (written, with photographs/ graphics and/or video)	40%	By 31 March 2023
Submission of Phase 2 case studies/ knowledge products	6 case studies/ knowledge products (written, with photographs/ graphics and/or video)	40%	By 31 May 2023

Plan Limited will cover the cost of all relevant and reasonable expenses such as travel and accommodation.

## 6. Expected qualifications of Consultant

### Required

- Advanced University Degree in International Development, social work or another related discipline. Applications will be also be considered from those holding a Bachelor's Degree with very strong and relevant work experience.
- Extensive hands-on experience working with international organisations in development communications and organisational learning, across diverse operational contexts.
- Understanding of partnership and civil society strengthening approaches, and the localisation agenda

- Understanding of gender responsive and transformative approaches
- Strong research and analysis skills
- Excellent written skills
- Experience working with visual media, including photography, videography, and developing graphics and illustrations
- Strong understanding of adult learning principles and structuring content for training and learning materials for adult learners
- Flexible work attitude, with the ability to work cross-culturally, follow direction and work independently across both a virtual and in person work environment
- Excellent organizational skills, with the ability to independently track and follow-up on various tasks
- Excellent written and verbal communication skills in English
- Computer skills, including MS Office, Excel, PowerPoint, Media Editing and Design Software

#### Desired

- Excellent written and verbal communication skills in Spanish and/or French

## 7. Contact

Any request for clarification or questions must be submitted to [procurement@plan-international.org](mailto:procurement@plan-international.org). Please quote the RFQ reference “**RFQ - FY23 – 140 Harvesting Partnership Practices for Learning**” in all communication.

## 8. List of documents to be submitted with the RFQ

Qualified candidates are requested to prepare and submit the following documents by **2<sup>nd</sup> January 2023**.

- Curriculum vitae with 2-3 examples of previous work (PDF)
- A detailed technical application outlining the proposed methodology and detailed work plan (maximum 3 pages) (PDF)
- A detailed financial proposal including hourly/daily rate as well as a breakdown of hours/days per activity (PDF). Pricing must be in GBP for UK-based consultants or GBP **and** your invoicing currency if outside the UK.

All consultants/applicant are required to agree and adhere to Plan International’s Non-Staff Code of Conduct (Annex)

## 9. Submission of offers

Please send your application to [procurement@plan-international.org](mailto:procurement@plan-international.org) by 23:59 (GMT) 2<sup>nd</sup> January 2023 referencing “**RFQ - FY23 – 140 Harvesting Partnership Practices for Learning**” in the subject line and including support documents as outlined.

## 10. Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at Plan’s discretion.

Plan International, at its sole discretion, will select the successful RFQ.

Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Request for Quotations

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the supplier.

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

Plan International may award multiple contracts and all contracts will be non-exclusive.

## 11. Contract & Payment terms

Please note that, if successful, Plan International's standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

## 12. IR35 Requirements – Only applicable for UK based or connections to the UK Consultants

As of April 2021, all Global Hub UK-based contractors (Consultant/personal service company/agency/intermediary) employing "people" in their chain to deliver services to Plan International must follow a strict process of IR35 determination.

Plan Limited will conduct a CES tool on all relevant shortlisted proposers as outlined above to determine whether they fall inside or outside IR35.

## 13. Plan International's Ethical & Environmental Statement

The supplier should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation

## 14. Clarifications

The onus is on the invited individual/companies to ensure that its offer is complete and meets Plan International's requirements. Failure to comply may lead to the offer being rejected. Please therefore ensure that you read this document carefully and answer fully all questions asked.

If you have any queries in relation to your submission, or to any requirements of this RFQ, please email: *<please insert Procurement Email address>*

Thank you for your proposal