



SOROTI CATHOLIC DIOCESE

INTEGRATED DEVELOPMENT ORGANISATION

Terms of Reference (TOR): Consultancy to Facilitate a Strategic Plan Development for SOCADIDO

1.0 Introduction

1.1 Background

Soroti Catholic Diocese Integrated Development Organization SOCADIDO is the development arm of Soroti Catholic Diocese; it came into existence with the creation of the Diocese in 1981. The Organization is active in Amuria, Kapelebyong, Bukedea, Kaberamaido, Kalaki, Katakwi, Kumi, Ngora, Soroti, and Serere districts of the Teso Sub Region, Eastern Uganda. SOCADIDO Vision is a prosperous, self-reliant and peaceful Teso and Mission is to empower the Teso communities to attain sustainable socio-economic development.

For the planning period 2017 to 2021, SOCADIDO has been reaching out to target communities under three thematic areas: Agricultural Development for Enhanced Livelihoods (AGRID), Business and Income Security (BINS), and Disaster Risk Reduction and Climate Change Adaptation (DRR&CCA) Programmes. Under each programme area, are separate projects designed as per the respective geographical or socio-economic needs of the community. SOCADIDO is at its final year of its Strategic Plan; it is desirable that a new Strategic Plan 2022-2026 is developed to guide future Organizational programmes.

2.0 PURPOSE AND OBJECTIVE:

The purpose of this assignment is for a Consultant to conduct background assessments and facilitate the development of a renewed strategic plan for **SOCADIDO** for the period 2022-2026.

2.1 OBJECTIVES:

The overall objective of this consultancy is to develop a five year Strategic Plan to ensure that **SOCADIDO** fulfils its mandate.

Specific Objectives:

- Assess and analyse **SOCADIDO** internal environment/ context (mission, vision, policies, activities etc.)
- Assess and analyse external environment and stakeholders
- Synthesis of results and identify strategic opportunities
- Plan and facilitate three day-long workshop with Board members, staff and others to prioritize strategic directions
- Support the Executive Director in designing appropriate metrics using the Theory of Change model and/or an organizational balanced scorecard to best align with identified strategic priorities
- Draft and finalize **SOCADIDO** strategic plan.

3.0 SCOPE and FOCUS of the assignment:

The scope and focus of the assignment is to provide technical, strategic and facilitation support to enable the renewal of **SOCADIDO** strategic plan. **SOCADIDO** has identified the need to engage a consultant to facilitate the development of an organizational Strategic Plan. A key aspect of the consultancy is preparation for and facilitation of a three-day strategic planning workshop with **SOCADIDO** board members, staff and stakeholders. It is expected that data will be analysed using a rigorous and transparent analysis framework, summarized and presented back to **SOCADIDO** to aid in prioritization of strategic directions.

S/he will conduct a thorough but focused assessment of **SOCADIDO** strengths and weaknesses, as well as external opportunities and threats, with a view to identifying appropriate strategic options for the 2022-2026 operational periods. The use of participatory processes is expected. Critical reflection by board members, staff and stakeholders is integral to this strategic planning initiative. As such, the Consultant will be expected to provide for active and meaningful engagement of **SOCADIDO** members and other stakeholders.

The consultancy will lead to the development of a Strategic Plan that will revisit the vision, mission and goals of **SOCADIDO** and help to determine and articulate the future direction of the organization. Consultancy will support the organization to establish realistic goals and objectives with a defined time frame; and assist with

the development of an action plan to achieve these goals and objectives. All data and the results of the workshop will be consolidated into a draft and finalized strategic document, including analysis and the presentation of metrics using a Theory of Change model and/or a balanced scorecard approach.

The Strategic Planning Process should support SOCADIDO to achieve the following:

- a) Clearly defined target beneficiaries and geographic area of focus, including strategic possibilities for geographic expansion
- b) Clearly defined target development sectors and program area of focus, including strategic possibilities for geographic expansion
- c) Financial sustainability plan; support for identifying new donors/income generation and developing standard proposal
- d) Review of development interventions and approach; identify new ways of working to achieve best practice and the realization of organizational and project goals
- e) Identify initiatives to be undertaken for improving organizational systems, structures, policy & procedures, including membership and governance of the Board
- f) Develop an action plan for the execution of the Strategic Plan.

4.0 PROCESS

The Strategic Plan should be developed following a participatory process. This should mutually inform and create ownership amongst relevant stakeholders, including target communities, **SOCADIDO** Staff and Board members and stakeholders & relevant representatives.

It is anticipated that the process undertaken should include interviews with relevant stakeholders, workshops with **SOCADIDO** Staff and Board members and review of relevant documents. Participants should have the opportunity to communicate their perspective about the relevance of the past activities of **SOCADIDO** and influence the changes required to improve the development strategy and approach.

It is expected that the consultant should assist **SOCADIDO** to analyse the information gathered, which should be used to inform the strategic direction of the organization and answer questions such as the following:

- a) Where do we want to see **SOCADIDO** in the next 5 years?
- b) What are the present strengths and weaknesses (including program implementation, management, governance, monitoring systems etc.)?
- c) What are the interventions to be undertaken for the strengthening of
- d) **SOCADIDO**?

- e) To what extent synergies can be brought in within and between domains to ensure best uses of human and financial resources?
- f) Who are the people that **SOCADIDO** should target, on what issues and where?
- g) Who are the donors that **SOCADIDO** can approach for funding its activities?
- h) How efficient and effective are current board and staffing structures?
- i) How can **SOCADIDO** build organizational sustainability?

5.0 Roles and Responsibilities:

- a) **SOCADIDO and the Strategic Planning Committee will be responsible for:**
 - a) Preparing the Terms of Reference
 - b) Selecting, contracting and managing the Consultant
 - c) Covering the costs of and managing communications and logistics associated with the assessment
 - d) Actively engaging with the Consultant during the assessment
 - e) Identifying stakeholders and relevant documents as needed
- b) **The Consultant will be responsible for:**
 - a) Preparation of a work plan and an appropriate Assessment Framework
 - b) Actively engaging with staff, Board members and other stakeholders through the use of participatory processes
 - c) Regular progress reporting to **SOCADIDO**
 - d) Production of deliverables in accordance with the requirements and timeframes of the Terms of Reference

6.0 Deliverables

The consultant will provide the following deliverables:

- a) An Analysis Framework based on the Terms of Reference
- b) A strategic plan workshop agenda and facilitation plan
- c) A five-year strategic plan including results and resources framework and action plan document including:

Executive summary

- a) Background of the strategic plan
- b) Vision, Mission, Goals and Objectives
- c) Organizational Core Principles and values
- d) Internal and External analysis (SWOT analysis)
- e) Organogram of **SOCADIDO**
- f) Direction: Where does **SOCADIDO** want to be in 5 years?
- g) Strategic Priorities: who are the target groups; geographical focus

- h) **Strategic Approach:** how can **SOCADIDO** best implement its development program
- i) How can **SOCADIDO** attain sustainability; what are the most pressing threats to this?
- j) **Strengthening SOCADIDO:** identify organizational development initiatives including governance and management structures review
- k) **Financial Projection:** situation analysis and opportunities to diversify financial resource base and donor base
- l) **Implementation Action Plan (IAP)** for execution of the Strategic Plan
- m) **Metrics** to assess progress made in the attainment of these strategic priorities (using Theory of Change and/or Organizational Balanced Scorecard and/or similar methodology)

7.0 TIME FRAME & WORK SCHEDULE:

a. Time-Frame: The Assignment should be completed by 1st December 2021

b. Work Schedule:

- a) Preparatory, desk review and consultations (3 days)
- b) Planning of Workshop (2 days)
- c) Facilitation of Strategic Planning Workshop (3 days)
- d) Preparation and delivery of workshop draft report (7 days)
- e) Revisions & Submission of Final Report (2 days)

8.0 Consultant Selection Criteria:

The ideal Consultant should have knowledge of and/or proven expertise in:

- ❖ Development
- ❖ Non- Government Organization (NGO)
- ❖ Participatory approaches in conducting assessments and facilitating strategic planning processes or Familiarity with the Theory of Change approach and building organizational balanced scorecards or Strategic planning document preparation

9.0 Required Qualifications of the consultant team/ firms:

- a) Minimum University degree of Masters in Business Administration, Management studies, Institutional Management and Leadership, Economics, Statistics, Development studies, social sciences and other related fields plus a post graduate diploma in M&E, Organizational development, strategic planning and other related fields.
- b) At least 10 years of relevant experience in NGO sector (Strategic Plan development and organizational development).
- c) Experience in working with women's rights and human rights, feminist, business and farmer organizations.

d) Rural development and natural resources and management

e) Current knowledge and understanding of the women's rights movement and the gender media coverage patterns

f) Experience with participatory approaches in conducting assessments and facilitating strategic planning processes;

10.0 Application process

Please send a cover letter responding to the Terms of Reference that includes a copy of your CV along with a short Rationales, Approach & Methodology for the strategic plan and a verifiable list of relevant strategic plans conducted in last five years. You should also submit a budget and an action plan to the Director SOCADIDO. Email: socadido@yahoo.co.uk with a copy to socadido@gmail.com. Applications should be submitted by 5:00pm_BDST on 9th November, 2021. For more information about **SOCADIDO** please visit our website: www.socadido.org

MANAGEMENT