



TERMS OF REFERENCE: CIVICUS JULY 2027– JUNE 2032 STRATEGY DEVELOPMENT PROCESS

Date: 23rd August 2026

Process Period: August 2026 – September 2027

New Strategy Go-Live: 1 July 2027

1. Background and Rationale

CIVICUS works to strengthen civil society and citizen action amid closing civic space, with serious restrictions in more than 189 countries. Its [2022–2027 strategic framework](#) has generated strong results in knowledge production, advocacy, narrative strengthening, counterpower building, institutional development, and membership growth. As the organisation prepares for its next strategic period, a comprehensive evidence base will be critical to guide its future direction.

The strategy development process will use a range of internal data, programme evaluations, staff input, and external evidence. The independent end-of-programme evaluation of CIVICUS' 2021–2026 strategic partnership with the Ministry of Foreign Affairs of the Netherlands (Netherlands MFA) will be one of several inputs, providing an external donor perspective on CIVICUS' performance and strategic relevance. Additional evidence will come from the CIVICUS Monitor, CIVICUS Lens, State of Civil Society Reports, historical membership surveys, annual reports, project evaluations, and structured staff consultations.

The 2028–2032 strategic planning process and the Dutch MFA evaluation are complementary but distinct. The strategy process will use the evaluation findings, alongside other evidence, to inform strategic choices; however, the evaluation team will not design the future strategy. Because the new strategy goes live on 1 July 2027, planning must conclude by May 2027 to allow time for Board approval and implementation preparation.

2. Purpose and Scope

2.1 Purpose

The process will produce a five-year strategy for 1 July 2027 to 30 June 2032 that:

- Reaffirms CIVICUS' role as a global alliance defending civic space and citizen participation.
- Draws on robust evidence from internal data, programme evaluations, staff input, and the Dutch MFA evaluation.
- Strengthens institutional readiness through MEL systems, digital infrastructure, staff well-being, and financial sustainability.

- Builds member ownership through inclusive consultation with members, grassroots groups, and under-represented regions.

2.2 Scope

The strategy will set out:

- Strategic objectives that reinforce CIVICUS' identity as a global alliance defending civic space and citizen participation.
- High-level Theory of Change comprising outcomes and measurable indicators and assumptions.
- Core functions, including advocacy, knowledge generation, networking, capacity development, narrative change, counterpower, and membership engagement.
- Key enablers, including MEL, digital systems, financial sustainability, staff well-being, equity, and inclusion.
- Governance and member participation mechanisms that enable ongoing input during implementation.
- Risk management approaches, including scenarios for further deterioration of civic space.

3. Relationship with the Dutch MFA End-of-Programme Evaluation

The Dutch MFA evaluation will serve as one of several evidence sources for the strategy. The evaluation team will not design the future strategy, and the strategy process will avoid duplicating the evaluation's data collection. Please see the table below for complementarity Principles:

Complementarity Principles

Principle	Application
No duplication of data collection	The Consultant will not interview donors, former Board members, or other stakeholders already included in the Dutch MFA evaluation.
Shared evidence base	Subject to confidentiality requirements, the final evaluation report and analysis will be shared with the Strategy Consultant as one input among several.
Coordinated timelines	The strategy workplan will incorporate evaluation findings. The final evaluation report, due in January 2027, will inform strategy drafting from January to March 2027.
Joint reference group engagement	The evaluation reference group and strategy Membership Committee may include overlapping members, to strengthen coherence.

4. Key Principles

The process will follow these principles:

- **Member-Driven & Inclusive** – The strategy will be co-designed by members, not merely validated. Active outreach ensures participation from under-represented regions, youth, grassroots groups, and dissatisfied members.
- **Evidence-Based & Robust** – All strategic choices are grounded in internal data (CIVICUS Monitor, Lens, State of Civil Society Reports, programme evaluations, staff input) and relevant external evidence, ensuring credibility and accountability.
- **Adaptive & Living** – The final strategy includes built-in mechanisms for annual check-ins and mid-term recalibration, ensuring it remains responsive to a volatile civic space.

- **Transparent & Accountable** – Progress, emerging findings, and how member input is used are communicated regularly and clearly to all members, building trust and shared ownership.
- **Ethical & Safe**– Consultations are conducted with a do-no-harm approach, protecting participants from retaliation.
- **Timely**: All milestones will be completed between August 2026 and May 2027 to meet the **1 July 2027** go-live date.
- **Complementary** -The process will build on ongoing work, including the Dutch MFA evaluation, by sharing evidence and avoiding duplicate data collection.

5. Process Phases, Key Activities, Timelines and Deliverables

The Strategy Development Process shall be structured as a carefully sequenced journey, unfolding over approximately 12 months from set-up through to approval and transition to implementation. The process is designed to be member-driven, evidence-based, and inclusive, ensuring that the resulting strategy reflects the aspirations and needs of the global alliance while remaining grounded in empirical evidence and institutional realities. The process is organised into six distinct phases, each building logically onto the previous one. While the phases are presented sequentially, the process is intentionally adaptive, allowing for iteration and course correction as insights emerge and the context evolves.

The phases are: *Set-up, Evidence & Sense-making, Consultation & Co-creation, Drafting, Validation, Approval & Launch, and Transition to Implementation*. Each phase is underpinned by a clear set of key activities, defined deliverables, and realistic timelines. The following table provides a high-level overview of the process, outlining the phases, key activities, deliverables, and timelines. This framework serves as a roadmap for the Strategy Consultant, the Strategy Core Team, the Membership Committee and the Board Steering Committee, ensuring alignment and shared understanding of the journey ahead.

Phase	Period	Key Activities	Deliverables
Phase 0: Set-up	August – September 2026	Recruit Strategy Consultant; form Board Steering Committee and Membership Committee; develop detailed workplan; briefing on available evidence sources.	Inception report; workplan; Methodology
Phase 1: Evidence & Sense-making	October – November 2026	Environmental scan; synthesis of internal data sources (CIVICUS Monitor, Lens, State of Civil Society reports, annual reports, project evaluations, staff input) and external	Environmental scan; evidence synthesis; list of strategic tensions.

Phase	Period	Key Activities	Deliverables
		evidence (including Dutch MFA evaluation).	
Phase 2: Consultation & Co-creation	December – January 2027	Regional online workshops (5–6 sessions); focus groups with diverse member groups; youth and grassroots consultations; Membership design retreat.	Consultation summary; strategic options paper (2–3 scenarios).
Phase 3: Drafting	February. 2027	Draft strategic framework with support from the Core team; iterative review with membership and Steering Committee.	Zero draft; first full draft.
Phase 4: Validation	April 2027	Open member validation (survey + webinar); targeted follow-up with under-represented groups; final revisions.	Validation report; final draft of strategy.
Phase 5: Approval & Launch	May – June 2027	Board retreat for final approval; design of communication products; member launch event. New Strategy Go-live on 1 July 2027	Approved FY 28–32 strategy; summary versions.
Phase 6: Transition to Implementation	July -September 2027	Support the development of Year-1 operational plans for each strategic objective. Support the development of a MEL framework with outcome and output indicators, baselines, and targets.	Support for Year-1 operational plan and MEL framework

Phase	Period	Key Activities	Deliverables
		Support the development of a launch communications package.	

6. Indicative Consultation Methods

Reflecting CIVICUS's identity as a member-driven global alliance, the consultation phase will be central to the strategy development process, not a box-ticking exercise. It will be the main mechanism for creating the strategy, ensuring the final framework reflects membership's diverse perspectives, lived experiences, and aspirations. The consultation methodology should promote meaningful participation, build trust, and ensure equitable representation across the alliance. It should actively engage under-represented regions, including Asia-Pacific and Oceania, as well as youth, informal movements, grassroots groups, and members who have previously expressed dissatisfaction. A mixed-methods approach combining digital surveys for broad quantitative input, regional online workshops for deeper discussion of regional contexts, and targeted focus groups that provide safe spaces for critique and co-design with specific constituencies are recommended.

7. Governance and Oversight

The process is supported by a clear governance and oversight framework that ensures the strategy is member-driven, evidence-based, inclusive, and accountable to the alliance. The structure includes **four interconnected bodies** with distinct roles and responsibilities, working together from set-up through approval and transition to implementation.

The Board Steering Committee provides strategic direction and governance oversight, ensuring alignment with CIVICUS's mission, values, and fiduciary responsibilities. **The Strategy Core Team**, drawn from across the Secretariat, coordinates day-to-day work, evidence synthesis, and reporting. **The Membership Committee** brings member voices into the centre of the process, helping ensure the strategy reflects the alliance's diverse perspectives, needs, and aspirations. **The Strategy Consultant** leads strategy design and facilitation, convening the participatory process in close collaboration with the Core Team and Membership Committee.

5.4 The Role of the Strategy Consultant/ Firm

The Consultant/firm will serve as the lead strategist, process designer, and convener for the CIVICUS 2028–2032 Strategy Development Process. They will design and deliver all phases of the process through approval and support the transition to implementation. Working closely with the Strategy Core Team and Membership Committee, the Consultant will ensure the process is member-driven, evidence-based, inclusive, and adaptive. They will bring external expertise, impartiality, and proven methodologies to guide the alliance through a rigorous, participatory strategic planning process, with specific attention to integrating the Dutch MFA evaluation findings throughout.

5.4.1. Key Responsibilities

Phase 0: Set-up

- Review foundational documents, including the 2022–2027 strategic plan, Theory of Change, accountability framework, recent annual plans and reports, and relevant evaluations. Participate in a joint briefing with the Dutch MFA evaluation team to understand timelines, data availability, and points of contact.
- Inform the composition of the Membership Committee (9–12 members)
- Co-design the detailed workplan, timelines, and consultation methodology with the Strategy Core Team.
- Develop facilitation tools, discussion guides, and survey instruments.

Key Output: *Inception report (workplan, methodology, stakeholder map, risk register)*

Phase 1: Evidence & Sense-making

- **Internal evidence:** systematically draw on data and knowledge from across the organisation — CIVICUS Monitor and research outputs, programme and campaign results, monitoring and evaluation findings, membership data and analytics, prior member surveys, Staff input (internal survey and team sessions) and financial and resourcing data etc. This should also explicitly incorporate the Dutch MFA evaluation findings.
- **External analysis:** analyse trends and scenarios in civic space, the funding and philanthropic landscape, the geopolitical and technological environment, and CIVICUS’ positioning relative to peers and allies.
- Facilitate a sense-making workshop with the Strategy Core Team and Membership Committee to identify key strategic tensions, tradeoffs, and priorities emerging from the evidence.
- **Key informant interviews:** work with Board members, senior leadership, staff and a section of members and partners to Conduct any limited, focused data collection to fill gaps not covered by existing evidence.
- Draft an Environmental Scan Report and Evidence Synthesis that, among others, explicitly incorporates the Dutch MFA evaluation findings and Validate with the Strategy Core Team.
- Facilitate a workshop to validate strategic tensions and agree on parameters for consultation.

Key Output: *Environmental scan report; evidence synthesis report; list of strategic tensions and priorities*

Phase 2: Consultation & Co-creation

- Develop short guidance and a set of core questions that staff can use to gather input on the strategy at their own convenings and meetings and run a brief brown-bag session to socialise the approach.
- Design and facilitate focus groups (4–6 sessions) with members, youth, grassroots groups, informal movements, and under-represented regions.
- Facilitate sessions with the Membership Committee to co-design draft strategic options.
- Consult staff, the Board, partners and funders, and provide accessible ways for voting members to contribute.
- Work with the Strategy Core Team to produce a Strategic Options Paper (2–3 scenarios).

Key Output: *Consultation summary report; strategic options paper (2–3 scenarios)*

Phase 3: Drafting

- Work with the Strategy Core Team to prepare a full draft Strategic Priorities framework, including (as agreed) refreshed vision/mission, overarching goal, strategic priorities, TOC and intended outcomes and assumptions.

Key Output: *Zero draft strategy; first full draft strategy*

Phase 4: Validation:

- Facilitate Board Steering Committee review sessions for each draft.
- Organize validation webinars (accommodating multiple time zones).
- Facilitate a validation process with staff, leadership and the Board, and revise accordingly.
- Prepare a validation report with support of the Strategy Core Team (how feedback was incorporated, including evaluation recommendations).
- Deliver a polished final draft, an accessible summary, and a presentation pack for governance and membership approval.

Key Output: *Validation report; final draft strategy*

Phase 5: Approval & Launch

- Facilitate a Board Strategy session to review, amend, and approve the final strategy.
- Support the Core Team and Communications team in developing summary products (2-page brief, infographic, slide deck, member launch event script)
- Facilitate a post-process evaluation (lessons learned for future strategic planning), including reflections on integration with the MFA evaluation.

Key Output: *Approved 2028–2032 strategy (full version); summary products (2-page brief, infographic, slide deck); annex on evidence incorporation; post-process e*

Phase 6: Transition to Implementation

- Support development of Year-1 operational plans, MEL framework, and launch of communications package.

Key Output: *Year-1 operational plan; MEL framework with indicators and targets; launch communications package*

5.4.2. Consultant's Collaborative Relationships

With the Strategy Core Team

- The Consultant works **in partnership** with the Core Team, which provides strategic oversight, Secretariat coordination, and internal knowledge.
- The Core Team manages day-to-day coordination, support drafting, stakeholder engagement, and reporting to the Board.
- The Consultant contributes **external expertise, impartiality, and facilitation** methods, while the Core Team ensures alignment with CIVICUS's mission, values, and operational realities.

With the Membership Committee

- The Consultant engages the Membership Committee as a key advisory body, ensuring member perspectives are reflected throughout the process.
- The Committee advises on member engagement, regional representation, and inclusive participation.

- The Consultant works with the Committee to make consultation methods accessible, culturally appropriate, and effective in reaching under-represented groups.

With the Board Steering Committee

- The Consultant updates the Board Steering Committee on progress, emerging findings, and key decisions.
- The Steering Committee provides oversight governance and approves key milestones and deliverables.

Authority and Decision-Making

- The Consultant leads process design, methodology, and facilitation.
- Strategic decisions, including approval of options and final strategy content, rest with the Board Steering Committee and the Board.
- The Consultant advises and makes recommendations **but does not decide on strategic content**.

8. Key Inputs and Evidence Sources

The process will draw on a broad range of internal and external evidence. These include but not limited to the following:

- **CIVICUS Monitor**: Provides country ratings and trend data on civic space. Analyse patterns by region, issue, and sector, and identify emerging threats and contexts where CIVICUS intervention has the greatest impact.
- **CIVICUS Lens**: Offers analysis and commentary on civic space developments. Review coverage themes to determine where CIVICUS' voice and analysis have the strongest impact and are most frequently cited.
- **State of Civil Society Report**: Annual reports from the 2022–2027 strategy period. Identify recurring findings and emerging themes that indicate priorities for the next period.
- **Membership survey (historical)**: Tracks trends in member satisfaction, needs, and priorities during the current strategy period.
- **CIVICUS Annual Reports**: Organizational annual reports from 2022–2025. Identify emerging trends and systemic gaps.
- **Project and programme evaluations**: Mid-term and final evaluations from Vuka! FoPA, CHARM Africa, Digital Democracy Initiative, Resilient Roots, and others. Assess what worked, for whom, and under what conditions.
- **Dutch MFA final evaluation**: Independent assessment of CIVICUS' strategic partnership with the Netherlands MFA (2021–2026). Provides a donor perspective on performance, relevance, and strategic alignment, and serves as one input to the strategy process.
- **Staff input**: Internal surveys and team sessions will capture staff perspectives on what is working, what should change, and where CIVICUS has untapped potential. Staff input will also be critical to building buy-in.

Additional External Sources

- **Financial analysis** – income diversification, geographic equity in subgranting.
- **Member engagement data** – participation rates in activities, governance, platforms.

- **Peer/competitor analysis** – how other global civil society alliances are evolving.
- **Environmental scan** – political, civic space, technology, funding trends.

10. Resources and Indicative Budget

The indicative budget for the process is up to **US\$ 30,000**, inclusive of professional fees and all associated costs. Consultants should submit a detailed financial proposal that demonstrates value for money and itemises all anticipated costs. Any travel or reimbursable expenses must be clearly identified and justified.

11. Risks and Mitigation

Risk	Likelihood	Impact	Mitigation
Dutch MFA evaluation delayed, limiting availability of this input	Medium	Low	The strategy process has multiple other data sources; if delayed, the evaluation can be referenced in the strategy annex rather than the main body.
Overlap or duplication with evaluation effort	Medium	Medium	Clear data sharing protocol; joint briefing; regular coordination between Core Team and evaluation team.
Compressed timeline	High	High	Dedicated strategy consultant; clear milestones with buffer.
Low member participation in consultation	Medium	High	Stratified outreach; incentives (recognition, exclusive briefings); asynchronous options.
Staff burnout	High	Medium	Dedicated strategy consultant; reduced non-critical activities; wellbeing support.
Board delays in approval	Low	High	Clear timeline with early circulation; Board retreat to be scheduled far in advance to ensure we meet the May 2027 timelines

12. Reporting and Accountability

- **Monthly:** Core Team update to Steering Committee
- **End of each phase:** Progress report shared with Membership Committee
- **Final:** Post-process evaluation (lessons learned for future strategic planning).

13. Transition to Implementation

Following Board approval in May 2027, a structured transition period in June 2027 will translate the strategy into practical plans and accountability arrangements. The Consultant will support the following areas:

13.1 Operational Planning

- **Annual workplans:** Each strategic objective will be translated into a Year 1 workplan (July 2027–June 2028), with clear activities, timelines, and responsible teams.
- **Budget alignment:** The approved strategy will be cost, with budgets aligned to strategic priorities.
- **Team briefings:** Staff will be briefed on the new strategy, their implementation roles, and how their work contributes to strategic outcomes.

13.2 Performance Indicators and MEL Framework

- **Indicator development:** A MEL framework will define outcome and output indicators for each strategic objective, with baselines and targets for Years 1, 3, and 5.
- **Data systems:** Existing MEL systems will be updated to capture the new indicators and report requirements.
- **Learning agenda:** A learning agenda will guide priority research and evaluation questions during the strategy period.

13.3 Review Cycles and Adaptive Management

- **Quarterly strategic check-ins:** The Core Team will review progress against strategic objectives, test assumptions, and identify emerging risks and opportunities.
- **Annual strategy review:** Each June, the annual review will assess progress, update the environmental scan, and recommend any Board-approved adjustments.
- **Mid-term recalibration:** A formal mid-term review around June 2029 will assess progress and guide course corrections.

13.4 Accountability Mechanisms

- **Board oversight:** The Board will receive quarterly progress updates and an annual strategy review report.
- **Member accountability:** Members will receive annual implementation updates and opportunities to provide feedback.
- **Donor reporting:** Donor reports will clearly link progress to strategic objectives.
- **Staff performance:** Individual and team objectives will align with strategic priorities.

13.5 Communications and Engagement

- **Internal launch:** A June 2027 staff launch will build shared understanding and ownership.
- **Member launch:** A June 2027 public launch will introduce the new strategy through accessible summary products.
- **Ongoing communications:** Regular member updates will share implementation progress, successes, and lessons learned.

7. Consultant Evaluation Criteria

Applications will be evaluated on the following criteria (**total 100 points**):

Criteria	Weighting	Description
Understanding of the assignment	15%	Demonstrated grasp of CIVICUS's strategic challenges, the range of evidence sources, and the complementarity with other ongoing evaluations

Criteria	Weighting	Description
Methodological approach	30%	Feasibility, creativity, and inclusivity of the proposed consultation and facilitation methods (especially reaching dissatisfied members and under-represented regions), and clarity on how evaluation findings will be integrated without duplication.
Experience and qualifications	25%	Relevant experience of facilitator(s) with global civil society alliances, participatory strategy processes, remote/hybrid facilitation, and integration of evaluation findings.
Workplan and timeline	10%	Realistic, well-sequenced, and aligned with CIVICUS's internal capacity, Board decision points, and the evaluation timeline.
Value for money	10%	Competitive and transparent pricing relative to the proposed level of effort and expertise.
References and track record	10%	Positive feedback from previous clients, especially similar membership-based organisations or assignments involving strategy-evaluation integration.

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