



## Terms of Reference

### SEforALL Charets

### Consulting Services on Strategic Design and Event Facilitation

#### 1. Background

In September 2011, UN Secretary-General Ban Ki-Moon launched the Sustainable Energy for All (SEforALL) initiative as a global partnership platform that was to promote and support new collaborative approaches for governments, business and civil society to work together in making sustainable energy for all a reality by 2030. Set up as a multi-stakeholder platform, SEforALL aims to contribute towards three interlinked objectives: (i) ensure universal access to modern energy services; (ii) double the global rate of improvement in energy efficiency; and (iii) double the share of renewable energy in the global energy mix. In working towards these goals, SEforALL engages with leaders across the world, empowering them to broker the partnerships and to unlock the finance necessary for a radical energy transformation in their countries, sectors or regions. SEforAll works by marshalling the evidence about what works and what doesn't; benchmarking the progress made across countries, and pointing to it; amplifying the voices of the energy poor and others who need to be engaged for a global movement to emerge; telling the stories of success to offer motivation where inertia is settling; and connecting leaders with each other and the ideas and innovation they need to move forward.

SEforALL is now looking for a suitably qualified and experienced company to provide consultation and design services, including all technical and administrative support, human resources, materials and equipment necessary, for the provision of Charet Design and Facilitation Support hereinafter referred to as 'Services'.

#### 2. Context of Assignment

The world is currently not on track to meet Sustainable Development Goal 7 (SDG7) of ensuring universal access to sustainable energy by 2030. Progress to date has not been at the pace needed and in some cases is going backwards. As we approach 2020 and the ten-year mark for achieving SDG7, the global community must quickly map out a strategy and concrete actions for greatly accelerated progress.

SEforALL will convene a set of charets on June 18 – 20, 2019 in Amsterdam, Netherlands, to identify actions for the global community to take forward that will increase velocity down the critical path towards successful achievement of SDG7 by 2030.

The charets will be intense but collaborative sessions in which a small group of individuals from diverse perspectives focus on identifying specific solutions to a number of identified questions or challenges. The principle of design thinking will be core to the charets, with the work focused on intensive inquiry, challenging assumptions, digging deeper and identifying actions and solutions – all with an inclusive, people-centered approach. Formal presentations are not envisaged; however, key background information may be presented at various times to set the stage and generate discussion. Each charet will be highly interactive, creating space for and ensuring the contribution of every participant to the discussion. To broaden the outreach, there may also be contributions from remote participants who dial in to the discussion.

The charets will be structured around two primary streams related to achieving SDG7:

- 1) data and evidence, and
- 2) finance.

During the three day event, it is anticipated that four distinct charets, each with approximately 25 people participating, will take place in parallel over the first two days, with the third day being separate side events and partner working sessions informed by the outcomes of the charets. The timetable is as yet not fixed and may be adapted based on advice received. Each of the four individual charets will require facilitation, indicating that four facilitators may be required to lead the discussions.

The objectives of the SEforALL Charets 2019 are:

- 1) To intensively inquire key questions regarding why more rapid movement down the critical path towards achievement of SDG7 has not occurred.
- 2) To identify disruptive pathways and solutions for increasing velocity down the critical path.
- 3) To expand the sustainable energy for all movement with new perspectives and disruptive ideas.
- 4) To conclude the charets with a set of defined actions and commitments for implementation from partners and other participants on a small set of impactful pathways and solutions for increasing velocity down the critical path.

The ingredients identified for successful SEforALL Charets include:

- a. identifying the right questions that will be answered in the charets around why progress is not happening at the rate required to achieve SDG7;
- b. providing the necessary analytical background and preparatory material for the participants to begin the charet process from a consistent vantage point;
- c. convening a limited number of participants in each charet (circa 25 per charet) that represent diverse backgrounds and expertise to enhance the ability of the group to interrogate the problem and identify disruptive pathways forward based on their unique mix of experiences and perspectives;
- d. expert charet preparation, consultation and design, incorporating design thinking; and
- e. experienced neutral facilitators who help each group progress through the intensive inquiry and narrow in on specific pathways and solutions forward to help deliver increased velocity down the critical path to achieving SDG7.

### **Participants**

The charets will bring together a group of diverse and multi-disciplinary stakeholders that are relevant for driving action on the data and evidence base and finance relevant to achieving SDG7. SEforALL will be responsible for identifying, inviting and confirming all participants. The preliminary list of participants would include:

- ) **Data and evidence:** the SDG 7 data custodians, national and international statistical agencies, experts from cross-cutting sectors, researchers/academics, civil society, donors, data architects, private sector actors, and policymakers.
- ) **Finance:** philanthropic and government donors, development and commercial banks, private sector actors, angel investors, venture capitalists and entrepreneurs.

## **3. Scope of Work**

**Services are sought for a consulting company to:**

- 1) Provide the expertise, guidance and input to appropriately and effectively design the charets, including the overall design thinking approach, process, structure and individual charet agendas;
- 2) Provide advice and guidance on the overall structure of the detailed analytical background and preparatory material, consistent with the design of a charet or similar design thinking based workshop to be provided to participants approximately one month in advance of the event, to ensure that participants are both prepared for and understand what the charet process is and expectations for outcomes. The substantive sustainable energy policy and information to inform the charets, such as the SDG7 inquiry questions and the analytical background material, will be provided by SEforALL or other sources, as will the participant list for the charets;
- 3) Develop and deliver facilitation principles, guidelines and training for each of the charet facilitators.
- 4) Propose up to four facilitators with some of the final facilitation team potentially either procured directly by SEforALL or through other companies. Partial quotations will be allowed if a vendor is not able to provide all four (4) facilitators.

- 5) Manage the facilitation of the charets to ensure that the process moves forward quickly on the intensive inquiry and more importantly progresses to identify pathways forward and concludes with defined actions and commitments for implementation.
- 6) Produce and deliver an SEforALL 2019 Charets internal meeting report for each of the sessions. This report will capture the key discussion threads, a summary of the session's outcomes and identified pathways and actions. The report should also capture any main points of convergence as well as divergence in the discussions. Further, a section of the report should evaluate the overall approach and process taken throughout the charets (what worked and what did not work) and the results of a survey of participants (participant feedback).

Each of the charets will be expected to take place as uninterrupted as possible, with all participants expected to stay and contribute to the discussion throughout the full session. The charets will take place in meeting space contracted by SEforALL which will include an appropriate setup including furniture and room setup, projectors, screens, access to WIFI, VC capabilities, and in-room coffee and other refreshments.

### **Terms of Engagement during the Planning, Design and Delivery stage**

The company would be expected to assign a representative as a primary point of contact and to lead the engagement with the SEforALL team throughout the terms of the contract and services provided. During the design stage, this lead representative and others from the company as appropriate, would engage with the SEforALL team to understand the key underlying concept and objectives of the charets. An initial kick-off meeting would be conducted in person in the SEforALL headquarters in Vienna, Austria. Subsequent planning and design meetings can be conducted through videoconferences and phone calls. The company is also expected to regularly engage with the SEforALL team for feedback and updates on the evolving design, structure and agenda of the charets and during the development of the background and preparatory material.

During the planning stage, the company would also be expected to develop and deliver the principles, guidelines and training for the facilitators.

During the delivery stage, the company would be expected to provide guidance and direction for the overall charet facilitation, advising and assisting all individual charet facilitators to expertly guide the sessions and also being able to offer insights, in terms of the strategic or innovative nature of the ideas and proposals delivered by the participants.

The company would also be expected to keep or gather a record of all charet discussions and outcomes to be able to summarize and reference them appropriately in an end-of-Charets report.

**Travel:** The company lead representative is expected to be able to participate in an initial kick off and planning meeting in Vienna, Austria shortly after completion of contracting. The lead representative and others from the company as deemed necessary to assist with facilitation are expected to be able to travel to **Amsterdam, Netherlands on 17 – 20 June 2019**. The travel costs, i.e. airfare ticket cost, DSA, and terminal expenses should be included in the proposal by the company.

**Reporting:** The company would report to the SEforALL Chief of Staff. Reporting is to take place as part of the timeline and deliverables specified below.

**Deliverables and Timeline:** The following represents key milestones with anticipated 2019 dates related to services needed from the company for charet design and facilitation. A detailed and updated task list and timeline will be made available to the selected company.

Date	Deliverables
Mid- Feb	Kickoff and initial in-person planning meeting with company; charet and design thinking principles outlined
15 Mar	Proposed structure and draft agenda for charets provided by company for review
12 Apr	Develop and deliver the principles, guidelines and training for the facilitators
12 Apr	Facilitator team in place (full team provided by company and SEforALL); and provided with principles and guidelines
26 Apr	Preparatory facilitation training session with all facilitators conducted by company

15 Apr – 10 May	Input and guidance provided from company for preparatory and background material
17 May	Charet structure and agendas finalized by company
17 May	Background and preparatory material finalized with input and guidance from company
17 Jun	On-site participation in and guidance for preparation and setup day at venue in Amsterdam, Netherlands by company; on-site preparation and guidance provided to facilitators
18 – 20 Jun	SEforALL charets take place in Amsterdam, Netherlands; oversight and continuous guidance provided to facilitators of all charets throughout the 3 days
21 – 28 Jun	Surveys and feedback sent to and collected by company from participants; post-charet reports and outcomes document collected from all facilitators.
5 Jul	Charets meeting report delivered by company

#### 4. Company Qualifications

1. The company should have been in business for at least 5 years providing consulting services.
2. The company should have at least 5 years of experience in designing and facilitating the implementation of workshops and highly interactive dialogues, preferably on energy topics, with groups of diverse and multi-disciplinary stakeholders, including for private sector companies, intergovernmental organizations, financial institutions, national and city-level governments, and/or NGOs.
3. At least 5 years of experience with curating, designing and delivering meetings, workshops and events utilizing design thinking and/or charet processes. Provide 3 examples.
4. Experience in training facilitators for design thinking and/or charet style workshops and dialogues. Provide at least 2 examples.
5. Demonstrated ability (evidenced through reports or other outcome material) to design and implement meetings, workshops and/or other events that deliver creative and out of the box thinking, question inquiry, and problem-solving to identify new ideas and innovative solutions. Provide examples.
6. (Required) Full working proficiency in English.

#### Qualifications of Facilitator(s):

SEforALL requires up to four facilitators to provide the necessary services, however partial quotations will be allowed if company is not able to provide all four (4) facilitators.

Facilitators must have the following experience and qualifications:

1. The facilitator(s) must have an advanced degree in a related field of specialization.
2. The facilitator(s) must have at least 5 years of experience facilitating workshops and highly interactive dialogues utilizing design thinking and/or charet processes, preferably on energy topics, with groups of diverse and multi-disciplinary stakeholders, including for private sector companies, intergovernmental organizations, financial institutions, national and city-level governments, and/or NGOs. Details of such experience should be included with the proposal for each facilitator.
3. (Required) Full working proficiency in English.
4. Travel will be required to Amsterdam, Netherlands on 17 – 20 June 2019.

#### 5. Payment Terms

- ) 25% upon contract approval and signature
- ) 50% upon submission and approval of charet structures and agendas, and facilitator guidelines and training (31 May 2019)
- ) 25% and final payment upon submission and approval of final report (5 July 2019)

The supplier should send an invoice to SEforALL. The invoice shall include the contract order, number, date of delivery, unit price and total amount. SEforALL will process the payments within 30 days of receipt of the invoice.

## 6. Contract Duration

Contract will take into effect as soon as possible upon contract approval (in early to mid-February) and end on 15 July 2019.

## 7. Technical & Financial Proposal

See attached bidding document forms to be returned with bid submittal.

Technical Proposal:

Understanding of the tasks:

- ) Proposed approach and methodology to complete the task
- ) Proposed timeframe and detailed work plan
- ) Proposed expert/team with CV
- ) Bidders are required to attach the CV's of the Lead Facilitator dedicated to this service.
- ) Relevant reference projects from previous successful projects.

Financial Proposal:

- ) Provide a financial cost proposal for the services listed in EURO.
- ) Partial quotations will be allowed if vendor is not able to provide all four (4) facilitators.

## 8. Bid Submittal Deadline

Bid submittals will be accepted no later than **Thursday, January 31<sup>st</sup>, 2019 17:00 Central European Time, Vienna, Austria.**

Technical and financial proposals shall be emailed to the Procurement Associate, Juan Cerda, at [juan@seforall.org](mailto:juan@seforall.org) by the bid deadline for bids to be considered.