

## **CBM Quick Process Reference Guide (QPRG)**

### **for Country Planning**

#### **Process description**

##### **1. Purpose of process**

The purpose of the process is to define and plan CBM's long-term national program work in line with the principles of needs and impact-oriented use of resources.

##### **2. Introduction and scope**

It is the responsibility of the Country Director to facilitate adherence to key principles as outlined in this QPRG and to assure the delivery of the “Country (Strategic) Plan” which is the final and approved documentation.

This includes

- tailoring the process to the local context in line with CBM's 3-way working collaboration
- developing and updating required documents
- ensuring adequate representation of key stakeholders
- aligning with the Regional Hub Director (especially in terms of adequate resources).

##### **3. Key stakeholders in the process**

External stakeholders in the country: for example, Disabled Persons' Organisations, government, implementing partner organisations, beneficiaries.

Internal stakeholders:

- Geography: Country Director (CD); Regional Hub Director (RHD), regional Country Planning Focal (CPF) person.
- Initiatives: Inclusive Eye Health (IEH), Community Based Inclusive Development (CBID).
- Resource Mobilisation: Institutional Donors & Philanthropy (IDP), Individual Giving and Donor Management (IGDM).
- Furthermore: CBM Executive Management for approval; the Portfolio and Partner Management Support (PPMS) Team for global support.

#### **4. Key process principles and considerations**

Country planning in CBM is a rolling process and contains the development of a 5-year-Country Plan. The plan needs to be reviewed, updated, and formally re-endorsed/ -approved every three years. An annual reflection of the plan is recommended. The four key process stages are: Preparation, situation analysis, plan development, documentation and approval.

#### **5. Specific situations**

The “Country Plan” responds to local context while considering core strategic principles of CBM plans and must be aligned to:

- Sustainable Development Goals
- UN Convention on the Rights of Persons with Disabilities
- CBM Strategy
- 5-3-1 plans of the regions
- Initiative plans
- Fundraising strategies
- CBM Theory of Change
- CBM Programme Quality Framework

#### **6. Minimum requirements**

The results of activities concerning the country planning or review are documented in the CountryPlanning\_DocumentationFormat.docx.

Supporting documentation is to be filed at country office and to be made available to stakeholders upon request. Guidance on how to develop the content and how to document is given in the document called CountryPlanning\_GuidanceNotes.docx.

In each Regional Hub Office is a Country Planning Focal person, available for supporting the Country Offices in the process. In case additional tools are needed this can be made available by the Strategic Portfolio and Partner Management Team together with hands on support and coaching.

## 7. Detailed process step and responsibilities

Key process/ Phase	Detailed process steps	Who	Participant stakeholders	Tools/Reference	Time/when
Preparation	<ol style="list-style-type: none"> <li>1. Agree timing of the process</li> <li>2. Review key documents on CBM's activities and compile lessons learned from previous years</li> <li>3. Conduct a CBM internal kick-off call for orientation</li> <li>4. Identify external stakeholders participating in the process</li> </ol>	CD	<p>RHD, Initiative Directors</p> <p>For step 3 additionally: CPF, Initiatives, IDP, IGDM, PPMS</p>	Guidance Notes	Time estimate: 1 month
Situation Analysis or Situation Review	<ol style="list-style-type: none"> <li>5. Conduct/ update Country Situation Analysis <ul style="list-style-type: none"> <li>• Analyse partner portfolio</li> <li>• Collect and analyse external trends and stakeholder needs</li> </ul> </li> </ol>	CD	RHD, CPF, Initiatives, IDP, IGDM, External Stakeholders	<ul style="list-style-type: none"> <li>• Guidance Notes</li> <li>• Terms of Reference</li> <li>- if hiring a consultant</li> </ul>	Time estimate: 2 months
Plan Development or Plan Review	<ol style="list-style-type: none"> <li>6. Develop Country Plan, including <ul style="list-style-type: none"> <li>• Strategic Priorities</li> <li>• Baseline Analysis</li> <li>• Implementation Risks</li> <li>• Financial Needs</li> <li>• Optional: Theory of Change</li> </ul> </li> <li>7. Set up a monitoring and learning plan</li> <li>8. Derive and align impact on workload and needed capacities in country office to deliver according to plan</li> </ol>	CD	<p>RHD, CPF, Initiatives, IDP, IGDM, External Stakeholders</p> <p>For step 8: RHD</p>	<ul style="list-style-type: none"> <li>• Guidance Notes</li> <li>• Country Plan Documentation Format</li> <li>• Annexe 5: Allocation of Budgets to Time Bands</li> <li>• Theory of Change</li> </ul>	Time estimate: 2 months

Documentation & Approval	9. Send final Country Plan to SPPM to facilitate endorsement and approval; storage of relevant documents	CD		<ul style="list-style-type: none"> <li>• Guidance Notes</li> <li>• Authority Matrix</li> </ul>	Time estimate: 1 month
	10. Seek endorsement/approval for Country Plan	PPMS	RHD, Initiatives, IDP, Executive Management		
	11. Review of Country Plan after 3 years followed by re-endorsement/-approval	CD	RHD, CPF, IDP, IGDM, External Stakeholders - PPMS for monitoring, re-endorsement/-approval		

Process Owner: Portfolio and Partner Management Support (PPMS) Team

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