

TEMPLATE FOR THE 4-YEAR STRATEGIC PLAN

APPLICABLE TO AREA 2:

ACCESS TO FINANCE (DEMAND OR SUPPLY SIDE OF MICROFINANCE OR SOCIAL ENTERPRISE FINANCE MARKETS)

Use this template to describe the activities planned for the period 2018-2021 and their implementation.

Please read and follow the instructions carefully, and write your text in the designated areas only.

Do not forget to date, sign and stamp the document before submission.

Name of the Organisation:

STRATEGIC PLAN 2018-2021

Date:

Signature and stamp:

PART A. GENERAL INFORMATION ABOUT THE ACTIVITIES AND THE NETWORK

1.1. Short summary of the action *(max. 2 000 characters with spaces)*

List the key objectives and the main activities for the period 2018-2021, as well as the groups of persons benefiting from the activities and the expected results.

Note: This part should be identical to the Point "Short summary of the action" in the section "Information on the action for which the grant is requested" of the SWIM grant application form.

1.2. The applicant organisation and the network it represents *(max. 5000 characters with spaces)*

Provide a short introduction of your organisation and the network it represents. Describe its legal status, its vision, mission and values, and highlight the main objectives and activities.

Note: This part should be identical to the Point "Main objectives and activities" in the section "Operational and financial capacity" of the SWIM grant application form.

1.3. Structure of the network

List the members of the network and describe the network's structure. In the list, always indicate the country where each member organisation is established.

Explain the involvement and the roles and responsibilities of the members of the network, including in the implementation of the activities.

1.4. Human Resources *(max. 4000 characters with spaces)*

Describe the organisational structure that your organisation puts in place for the implementation of the activities over the four-year period.

List the key persons who will be involved in the coordination and main tasks related to the implementation of the activities and attach their CVs to the application. For newly established organisations, list the profile of the staff to be selected and attach a recruitment plan to the application.

1.5. Coherence and consistency *(max. 4000 characters with spaces)*

Demonstrate how the objectives of the network meet the objectives of the Call for proposals.

Explain how your activities are supporting/complementing the activities of the EU on the respective policy field.

Note: This part should be identical to the Point "Specific objective(s)" in the section "Information on the action for which the grant is requested" of the SWIM grant application form.

1.6. Monitoring and evaluation of the activities and results *(max. 4000 characters with spaces)*

How will the activities and the results be monitored and evaluated?

Explain how you plan to organise feed-back mechanisms during and after the implementation of the activities (satisfaction surveys, evaluation forms, etc.), which information you plan to collect and how you will use the feed-back received.

Explain which quantitative and qualitative indicators you propose to use for the evaluation of the results.

1.7. European added value *(max. 4000 characters with spaces)*

What is the European added value of your activities?

European added value of the strategic plan shall be assessed in the light of criteria such as its contribution to the elaboration and dissemination of best practices or its potential to create practical tools and solutions that address cross-border or Union-wide challenges; its contribution to the consistent and coherent support of EU policies and to wide awareness raising and knowledge-enhancement activities of EU and national policies; its potential to voice the public's concerns from different regions of Europe and to promote them in all EU and national policies

1.8. Expected results *(max. 4000 characters with spaces)*

What are the expected results of the activities planned for the period 2018-2021? Who will benefit from these results and how? How will these results contribute to achieving the priorities of the Call?

Results are immediate changes that arise for the target groups after the completion of the activities (e.g. improved knowledge, increased awareness), not activities or outputs.

Note: This part should be identical to the Point "Expected Results" in the section "Information on the action for which the grant is requested" of the SWIM grant application form.

1.9. Dissemination of the results *(max. 4000 characters with spaces)*

Outline your dissemination strategy, explaining how you will communicate on the activities as well as share the results of the 4-year strategic plan with all stakeholders, including individuals, organisations and institutions at all level.

The dissemination strategy should be clear, targeted and appropriate, to ensure that the results will reach the target groups and/or the general public, and that they will be optimally used. Particular attention should be paid to the availability of results.

1.10. Sustainability of the network *(max. 4000 characters with spaces)*

Explain how the EU funding will help you develop the capacities of the network and how you plan to ensure the sustainability of your network in the future.

1.11. Long-term impact of the results *(max. 4000 characters with spaces)*

Are the results likely to have a long-term impact? How?

In this part you should not list activities or outputs, but you should focus on the expected long-term impact of your activities. The long-term impact refers to long-term socio-economic consequences that can be observed after a certain period following the completion of the activities and may affect either the target groups of the activities or other groups falling outside the boundary of the activities.

1.12. Budget forecast 2018-2021

Provide an overview of the estimated total costs for the period 2018-2020 (in euros). The explanation of what should be included under the different budget headings is included in the financial guidelines for applicants.

Operating grants may be provided and may cover maximum 80% of these annual costs. You should indicate in the table below an estimate of the co-financing rate you will require from the Union (i.e. the percentage of the costs to be covered by the operating grant).

Estimated costs (€)				
<i>Budget heading</i>	2018	2019	2020	2021
Staff costs				
Travel, accommodation and subsistence allowances				
Costs of services				
Administrative costs				
TOTAL Eligible Direct Costs				
Estimated co-financing rate in % (max 80%)				

PART B. DESCRIPTION OF THE STRATEGIC OBJECTIVES AND KEY ACTIVITIES FOR THE PERIOD 2018-2021

Describe the strategic objectives and the main activities that you will undertake during this period.

Strategic objectives should be understood as desired or needed results to be achieved by a specific timeframe. An objective consists of the benefits that an organisation expects to achieve as a result of spending time and exerting effort to complete a number of key activities. Please make sure not to confuse strategic objectives with outcomes/deliverables. Strategic objectives should be quantifiable, consistent, realistic and achievable and they shall be fixed for the end of the agreement at the latest.

The **activities** should be organised under the four specific categories provided below. In this document you are expected to present the strategic planning of your activities, which will set the framework of the specific activities of each year. You are not expected to present a detailed planning of the annual activities. Please provide an indication of timeframe (ie year(s) when the activities are expected to be implemented). **You may insert/delete individual activities as needed.**

The specific activities to be implemented in 2018 must be further detailed in the Annex: "Annual Work Programme 2018".

Please **respect the sign limits** indicated in each section. It is in your interest to keep your text as **concise** as possible, and to avoid unnecessarily long proposals.

Note: This part should include the full description of the work plan 2018-2021. The Point "Workplan" in the section "Information on the action for which the grant is requested" of the SWIM grant application form is complementary only and not compulsory. You may choose to indicate "Refer to the Annex: 4-year strategic plan" if you do not wish to provide complementary information.

1. Supporting the Commission in its outreach activities at EU, national and local level with the aim of ensuring the implementation of European policies in the relevant area (e.g. Programme for Employment and Social Innovation, European Social Fund, Social Business Initiative, Start-up and Scale-up Initiative, etc.)

A clear link between multiple activities of the Commission in the field of access to finance shall be envisaged. In particular, the focus should be on the Commission activities in building microfinance and social investment markets in Europe (including through EaSI financial instruments and via the call on Supporting the demand and supply side of the market for social enterprise finance) and any follow-up action thereof.

Strategic objective	Planned activities	Timeframe			
		2018	2019	2020	2021

2. Reinforcing the capacity of the network's members, including through offering a platform for the exchange of good practices in the relevant field, and raising awareness about relevant EU policies.

Strategic objective	Planned activities	Timeframe			
		2018	2019	2020	2021

3. Voicing the concerns and expectations of organisations facilitating access to finance to (potential) entrepreneurs from disadvantaged and underrepresented groups / social enterprises

Strategic objective	Planned activities	Timeframe			
		2018	2019	2020	2021

4. Providing data / research on developments in the field and on priority topics

Data/research should provide input for policy design in the areas of microfinance or social enterprise finance. The focus can be put on broad overviews as well as on specific niche topics related to the field.

Strategic objective	Planned activities	Timeframe			
		2018	2019	2020	2021