



TERMS OF REFERENCE

**Consultancy: Revise critical elements of the Agency's Strategic Plan
and
implement an integrated web-based M&E System for Caribbean Export Development Agency**

1. BACKGROUND INFORMATION

1.2. Contracting Authority

Caribbean Export Development Agency (Caribbean Export/ the Agency)

1.3. Relevant Background

The Caribbean Export Development Agency (Caribbean Export) is the only regional trade and investment promotion agency within the African, Caribbean and Pacific (ACP) States, and was established in 1996 by an Inter-Governmental Agreement among the Forum of the Caribbean Group (CARIFORUM) of ACP States. Headquartered in Barbados, with a Sub Regional Office in the Dominican Republic, Caribbean Export serves 15 CARIFORUM countries, namely: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Haiti, Grenada, Guyana, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

The Agency's vision is to be internationally recognised as the leading driver for Caribbean private sector development, with a mission to enhance the competitiveness and value of Caribbean brands through the delivery of transformative and targeted interventions in export development and investment promotion.

Caribbean Export carries out numerous programme-based activities designed to enhance the competitiveness of regional small and medium-sized enterprises (SMEs); promotes trade and development among the CARIFORUM; promotes stronger trade and investment relations among CARIFORUM and the French Caribbean Outermost Regions (FCORs) and the European Union (EU) Overseas Countries and Territories (OCTs) in the Caribbean, as well as promotes stronger trade and investment cooperation between the Caribbean Community (CARICOM) and the Dominican Republic.

Monitoring and Evaluation (M&E) is a core function of Caribbean Export. Since 2018, the Agency has been in the process of comprehensively assessing its overall M&E system and operations, with the intent to upgrade it for more efficiency and user-friendliness, while maintaining its robustness and RBM standards. An enhanced M&E system that is more user-friendly but still robust will improve the capacity of staff and play a pivotal role in ensuring that the Agency effectively monitors and evaluates the 11th European Development Fund (EDF) Regional Private Sector Development Programme (RPSDP) and other programmes that will be executed with other development partners. Monitoring provides feedback on the progress and process of implementation, while evaluation analyses the feedback provided by stakeholders to articulate lessons learnt; illustrate the impact of interventions; and inform future programme approach. As the only regional trade and investment promotion agency within the ACP States, Caribbean Export is focused on obtaining results and making a positive impact through its intervention, for its beneficiaries and stakeholders, regionally and internationally. As such, the Agency utilises a results-based management (RBM) system in its M&E operations, where performance and achievements at the output and outcome levels of strategic interventions are expected to be optimal to achieve desired impact.

In November 2018, the Agency contracted a consulting firm that was tasked with the role of assessing the Agency's current M&E system, with a view of revamping and enhancing it

(documents and processes) to have a more tailored and pragmatic approach, which would allow for greater effectiveness and efficiency. The short-term consultancy was the necessary first phase to help the Agency assess the state of its M&E operations; identify the gaps and complex challenges as it pertains to reporting and information flow; and to arrive at a clear vision on a way forward in streamlining and improving the Agency's M&E overall processes and system. Coming out of the short-term consultancy, the consultant recommended that Agency can benefit from a revision to the current Strategic Plan and Performance Measurement Framework; and the development and implementation of an open-source web-based M&E system. Considering these recommendations, the Agency will be undertaking a phase II of the project to revise critical areas identified in the current Strategic Plan and implement, in conjunction with the Agency's M&E and Operations Departments, an integrated web-based M&E system. The implementation of these two critical elements would both play critical roles in improving the effectiveness, efficiency, and streamlining the Agency's M&E processes and operations.

1.4. Related programmes and other donor activities:

None

2. OBJECTIVE, PURPOSE AND EXPECTED RESULTS

2.2 Objectives

- To revise, in conjunction with the Agency's M&E and Operations department, the Agency's strategic objectives and other critical areas identified in the current Strategic Plan, that includes a revised M&E framework and evaluation strategy; SMART new performance indicators; M&E Plan; refined information flow/cycle; and relevant templates (project documents), that would streamline and improve the effectiveness and efficiency of the Agency's daily M&E operations;

- Design and outline a M&E framework that is consistent with the Agency' operations and strategic direction;
- Using the structure design from above, develop and implement a user-friendly integrated web-based M&E system that would allow for efficient and easy information entry, collation and analysis to better inform internal and external reports; and
- Provide training to key stakeholders within the Agency on the M&E systems and its maintenance.

2.3. Purpose of Consultancy and Expected Results

The purpose of the consultancy is to ensure that the Agency's M&E systems is robust, yet streamlined to meet the highest standard of reporting expected by our stakeholders and donors, including the European Union, CARIFORUM Directorate, the World Bank, the Caribbean Development Bank and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

The expected results from this consultancy should include the following:

1. Revised Agency's strategic objectives and other critical areas identified in the current Strategic Plan that includes a new M&E framework and evaluation strategy; SMART new indicators for the M&E Plan; refined information flow/cycle; and relevant templates (project documents) that would streamline and improve the effectiveness and efficiency of the Agency's daily M&E operations and are implementable and applicable to the Agency's current working environment;
2. An integrated web-based M&E system that is operational and user-friendly;
3. Key internal stakeholders are trained on operating the integrated web-based M&E system; and
4. Technical capacity of the Agency's advisor-monitoring and evaluation increased.

3. ASSUMPTIONS, RISKS AND MITIGATION

3.1. Assumptions

- The Agency has the IT capacity and administrative structure already in place to host and operate a web-based M&E database system;
- The consultant hired would be able to execute the consultancy in the time frame allotted;
- Caribbean Export will be able to maintain the web-based M&E system; and
- Staff will be able to attend and respond positively to the training.

3.2. Risks

- Unforeseen challenges with the Agency's IT and administrative capabilities to host the web-based M&E database system can result in changes to the Scope of Work;
- The development and implementation of the web-based M&E database may take longer than expected;
- Low implementation and usage of the new web-based M&E system by staff;
- Implementation timeline of overall project may be longer, due to unforeseen project changes; and
- Lack of buy-in from key internal stakeholders.

3.3. Mitigation

- Agreement with key (internal) stakeholders on areas of the revised Strategic Plan to be updated are undertaken within the project timelines, to ensure completion of the document in a timely fashion;
- Close monitoring and reporting on each phase of the project to ensure that timelines for deliverables are met by consultant;
- Early planning and discussions of consultancy and training components to allow relevant staff to plan and schedule their availability;

- Timely selection of M&E consultant and early inception meeting to define expectations, set realistic timelines, discuss contingency plans for the project and discuss approach and objectives of the consultancy.

4. SCOPE OF WORK

4.1. Specific Activities to include, but not limited to;

The M&E consultant/consulting firm is expected to complete the following activities:

- Participate in an inception meeting with Caribbean Export and submit an inception report;
- Consult (via online, if necessary) and come to an agreement with key stakeholders within the agency on the critical areas to be revised and finalised for the new Strategic Plan 2020-2023
- Develop and present the blueprint of the integrated web-based M&E database system to Agency;
- Populate this new system with relevant information/data and test to ensure proper functionality;
- Develop a process map reflective of this new M&E system, along with an operational manual and relevant training materials;
- Provide training sessions to the Agency's key staff members on the use and operation of web-based M&E system to ensure that they understand and have increased capacity and knowledge to utilise the new system effectively; and
- Finalise and submit revised strategic objectives and other critical areas identified in the Strategic Plan that includes a new M&E framework and evaluation strategy, SMART new indicators, M&E Plan, refined information flow/cycle, and relevant templates (project documents) that would streamline and improve the effectiveness and efficiency of the Agency's daily M&E operations and are implementable and applicable to the Agency's current working environment.

5. PROJECT MANAGEMENT

5.1. Responsible body

The Caribbean Export Development Agency

5.2. Management Structure

The officer in charge or the executive director be responsible for the overall project. Day-to-day supervision of this specific consultancy will be the responsibility of the Agency's advisor-monitoring and evaluation.

6. LOGISTICS AND TIMING

6.1. Location

The consultant will be required to travel to Barbados at least twice.

6.2. Office accommodation

Office accommodations would be provided to the consultant during his/her visits to Caribbean Export (Barbados office) to conduct the relevant consultations, validation and training exercise and database testing and training.

6.3. Commencement date and period of implementation of tasks

The duration of this term of service shall be from **15 April 2019 to 15 August 2019** (both dates inclusive). Extensions may be agreed upon by both parties, if applicable.

7. REQUIREMENTS

7.1. Personnel

Qualifications and Experience Required

- A post graduate degree with an emphasis in project management, monitoring and evaluation (M&E), international development, risk management, results-based management (RBM) or any other related field;
- Demonstratable experience in results-based management and strategic planning;
- Knowledge of M&E software/database development and implementation;
- Knowledge of the CARIFORUM/CARICOM organs and working in the Caribbean Region would be a distinct asset;
- Experience working with international NGOs and other development organisations;
- Excellent analytical skills;
- Excellent presentation and communication (oral and written) skills; and
- Fluent in English. Fluency in French and/or Spanish would be an asset.

7.3. Required documentation

Interested persons must submit the following documents to Ms. Kareitha Gill, Advisor-Monitoring and Evaluation at kgill@carib-export.com, with a copy to Ms. Wendy Graham at wgraham@carib-export.com.

- **Curriculum vitae**
- **Financial proposal**
- **Technical proposal**

To be considered for this consultancy, applicants must respond by 28 March 2019, no later than 4:30 p.m. Barbados Time. No late submissions will be accepted.

8. REPORTS

8.1. Reporting requirements:

- **Inception report**- reflecting any changes or new approaches discussed and agreed to in the inception meeting. This report is to be submitted no later than one week after the inception meeting.
- **Progress Report on the revised critical areas of the Strategic Plan** – succinct report outlining the suggested revisions, agreed with key stakeholders that will be made to the revised strategic plan 2020-2023 (as outlined in bullet point 2 of section 4.1 above).
- **Blueprint/design of web-based M&E system** - this should be a document that discusses the various stages in the development of the system; protocols and other necessary information for uploading and testing etc. the system, to be submitted six weeks after the signing of the contract;
- **Draft of the revised critical areas in the Strategic Plan**- A draft document should also include a brief report on the consultative process of the document;
- **Web-based M&E system operational manual**- This manual should include all aspects of configuration, trouble shooting and usage of the web-based system, to be submitted sixteen weeks after the signing of the contract;
- **Report on the training with training materials (presentation etc.) and schedule for new M&E system** and plan to be submitted twenty weeks after the signing of the contract;
- **A final Report** – This document should include the following:
 - ✓ an outline of the final integrated web-based M&E platform; and
 - ✓ present the final revised critical areas (strategic objectives) in the strategic plan, which should include the final new M&E framework and evaluation strategy, SMART new indicators, M&E Plan, refined information flow/cycle, and relevant templates (project documents) that would streamline and improve the effectiveness and efficiency of the Agency’s daily M&E operations.

All products and tools developed should be implementable and applicable to the Agency's current working environment and must be submitted fourteen weeks after the signing of the contract.

9. SUBMISSION & APPROVAL OF REPORTS

The reports and deliverables as referred to above must be submitted to the officer in charge or the executive director and copied to advisor-monitoring and evaluation. All reports must be submitted in English in electronic *Word* format. The officer in charge is responsible for approving the reports.

10. PAYMENT TERMS

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the agreed deliverables. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and contractor.

11. MONITORING AND EVALUATION

The Consultancy will be monitored and evaluated by Caribbean Export over the duration of the project. Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 4.1 (Scope of Work) and 8.1 (Reports) and as outlined within the work plan submitted in the inception report. Feedback, other than acceptance, on each submitted deliverable is not a requirement for the continuation of the project. The Contracting Authority will provide feedback to the consultant within five (5) working days of receipt of the final report.

12. SPECIAL REQUIREMENTS

None.