

TERMS OF REFERENCE

CONSULTANCY: RESULTS BASED MANAGEMENT FOR CARIBBEAN EXPORT

1. BACKGROUND INFORMATION/RATIONALE

1.1 Relevant background

In 2021 the Caribbean Export Development Agency developed the Strategic Plan 2021-2024 with the theme 'Building Business Transforming Lives for a Resilient Caribbean'. The Agency's success in implementing the strategic plan will depend heavily on tracking progress towards expected results.

Within this plan the Agency committed to implementing a comprehensive results-based management framework. Currently, the Agency operates within a basic M&E infrastructure, where an M&E framework, Policy, Evaluation Strategy, and document dossier system have been developed to guide the Agency's M&E operations.

The fundamental goal of Results-Based Management (RBM) is to create and use evidence/performance information/data to advance management practices and strengthen accountability and good governance.

An ongoing process of monitoring, evaluation and learning will improve delivery processes, document results, inform stakeholders about the relevance, effectiveness, efficiency of the strategic plan, and mobilize political support for sustaining and expanding the programmes.

In view of this, Caribbean Export seeks to work with an RBM specialist to support collection of data from the Agency's activities through the implementation of the ongoing process of monitoring and evaluations.

1.2 Contracting Authority

The contracting authority for this assignment is the Caribbean Export Development Agency and it is funded by the 11th EDF Regional Private Sector Development Programme.

1.3 Beneficiary Countries

The primary beneficiaries under this project are the business support organisations and the private sector in CARIFORUM countries: (Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St Kitts and Nevis, Saint Lucia, St Vincent and the Grenadines, Suriname and, Trinidad and Tobago).

1.4 Target Groups

CARIFORUM private sector organisations, business support organisations.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall Objective

The overall objective of this Consultancy is to develop and implement systems and mechanisms that ensure robust and rigorous monitoring, measurement and proactive guidance on programme, project and task implementation at the Agency.

2.2 Specific Objectives

Specifically, the consultancy aims to implement an RBM framework based on the scope of work outlined in 4.1. in the process of collecting data and generating reports on the Agency's programmes.

2.3 Purpose of consultancy and expected results

The purpose of the Consultancy is to develop and implement a robust monitoring and measurement system that captures meaningful data in line with the Agency's strategic goals. It is expected that as a result the Agency will be able to produce a suite of reports and communications materials that highlight the impact and results of the Agency's work. Further, an RBM culture is adopted within the Agency.

3. ASSUMPTIONS AND RISKS AND MITIGATION

3.1 Assumptions

- There is a consultant with the requisite qualifications and experience available.
- There is adequate time to implement the scope of work.

3.2 Risks

- The above assumptions are not actualised.

3.3 Mitigation

- The scope of work can be adjusted to focus on immediate needs.
- The timeframe for implementation can be extended.

4. SCOPE OF WORK

4.1 Specific Activities

Vision/Strategy Development and Execution

- a. Develop and communicate, in conjunction with the Caribbean Export Executive Team, the Strategic and Operational KPIs for all areas in Caribbean Export.

- b. Continually assess the relevance of the KPIs based on changes in external dynamics and organisational focus.
- c. Lead the development and implementation of Operational Plans for the Strategic Plans.
- d. Drive the development and implementation of RBM templates for quarterly, annual and three-year reporting on Strategic Plan and major programme deliverables.

Innovation, Growth and Organisational Capacity

- e. Support the HR Officer in the development and facilitation of RBM training and awareness sessions for all members of staff.
- f. Develop customised RBM (Results-based Management) Tools and Templates for Caribbean Export.
- g. Coach the Management Team on strategies for improving the efficiency and effectiveness of project management and reporting.

Customer-Stakeholder Management

- h. Ensures that Caribbean Export maintains an effective two-way communication channel on the status of its KPIs with its major stakeholders.
- i. Develop and implement Caribbean Export's internal project and programme reporting framework.

Financial Stewardship

- j. Develop and implement financial monitoring metrics for all areas in Caribbean Export based on the Strategic Plan and the general operational demands of the organisation.

Internal Business Processes

- k. Work with the Caribbean Export Executive Team to develop a Caribbean Export Strategic Plan Monitoring and Evaluation Framework.
- l. Communicate and educate the Caribbean Export staff on the Monitoring and Evaluation Framework.

5. PROJECT MANAGEMENT AND REPORTING

5.1 Responsible Body

Caribbean Export Development Agency

5.2 Management structure

The Executive Director will retain overall responsibility for the overall project. Day-to-day supervision of this specific programme is the responsibility of Senior Advisor – Marketing & PR, who will communicate progress to the Executive Director.

5.3 Reporting

A monthly/weekly progress report outlining key activities undertaken, progress made, and results achieved, must be submitted to Senior Advisor – Marketing & PR.

6. LOGISTICS AND TIMING

6.1 Commencement date and period of implementation of tasks

This consultancy is expected to commence on June 1, 2022, for a seven (7) month period ending December 31, 2022.

7. PAYMENT TERMS

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the progress report and appropriate invoice. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and the consultant.

8. REQUIREMENTS

8.1 Qualifications

- A Bachelor's degree in Project Management, Management, Internal Auditing or a related field.

8.2 Work Experience

- At least 5 years' experience in a similar capacity in a comparable organisation.
- Demonstrable track record of achievement in the fields of project and programme management.
- Computer proficiency skills particularly in project management applications.
- Excellent public speaking and meeting facilitation skills.
- Excellent writing skills particularly in technical reporting.
- Multitasking skills and the ability to perform effectively under pressure and tight deadlines.
- Relationship management skills.
- Fluent in English. Ability to communicate in French, Spanish or Dutch, desirable.

8.3 Required Documentation.

- The Applicant must submit their CV, a quotation and the completed [Applicant Declaration Form](#)

CV's and quotations together with the [Applicant Declaration Form](#) must be submitted to Ms. JoEllen Laryea, Senior Advisor – Marketing and PR at jlaryea@carib-export.com no later than 5.00pm AST on May 20, 2022.

8.4 Office Accommodation

Caribbean Export will provide a space in which the Consultant may work at the Headquarters office in Barbados.

8.5 Facilities to be provided by the Consultant

The consultant will be provided general office and administrative support.

8.6 Equipment

The consultant will be provided a desk, computer and desk phone at the Headquarters office in Barbados.

8.7 Travel

Any travel required will be separately covered by Caribbean Export.

9. REPORTS

9.1 Reporting requirements

- An inception report outlining the proposed workplan for the first 3 months.
- A report at the end of each month that outlines the key activities undertaken.

9.2 Submission and Approval of Reports

The reports and deliverables as referred to above must be submitted to the Senior Advisor, Marketing and PR. All reports must be submitted in English in electronic format. The Executive Director is responsible for approving the reports.

10. EXCLUSION CRITERIA

Candidates will be excluded from participation in the bidding process if they:

- a) are bankrupt, insolvent, filing for insolvency or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) are the subject of proceedings for fraud, corruption, a declaration of bankruptcy, for winding-up, for administration by the courts, for an arrangement with creditors or for any similar procedure provided for in national legislation or regulations;
- c) have been convicted of an offence concerning professional conduct by a judgement which has the force of *res judicata*
- d) are guilty of grave professional misconduct proven by any means which Caribbean Export can justify;
- e) are guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in the procurement process; they have been declared to be in serious breach of contract for failure to comply with

- obligations in connection with another contract with the same Contracting Authority or another contract financed with Caribbean Export's funds;
- f) are in breach of payment of taxes or social security contributions;
 - g) have been convicted or are the subject of proceedings for money laundering, terrorist offences or activities, child labour, human trafficking, being a criminal enterprise in the production of goods and services, or any other irregularity;
 - h) are established as or operating as a shell company.

A derogation from the mandatory exclusion clauses provided above, may be provided on an exceptional basis, for overriding reasons to entities operating in the public interest such as public health or protection of the environment.

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 5.3 and 5.4, 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. However, in some instances the Consultant may need to integrate any feedback into the subsequent deliverables. The Contracting Authority will provide feedback to the consultant within ten (10) working days of receipt of the final report.

12. SPECIAL REQUIREMENTS

Any special requirements which the Consultant must take into consideration in the conduct of the Consultancy.

13. PUBLICATION OF INFORMATION

To participate in any activity executed or supported by Caribbean Export, you hereby agree that any information and personal data that you share and is collected by the Agency will be processed for the purpose of reporting the outcomes and impact of your projects and/or participation. Please note that Caribbean Export reserves the right to publish the Contractor's/Participant's name and address, the purpose and nature of the activity, and financial arrangements, in accordance with Caribbean Export's Personal Data Protection Policy. (<https://www.carib-export.com/download/196891/>). Derogation from publication of this information may be granted if it could endanger the Contractor/Participant or harm his/her commercial interests.

14. DECLARATION

To participate in any procurement undertaken by Caribbean Export, all applicants must complete and submit to the agency the Applicant Declaration Form. <https://www.carib-export.com/download/197007/>