

**Rural Economic Development Initiative (REDI)**  
**REQUEST FOR EXPRESSIONS OF INTEREST**  
**For a Consultant to Develop a Community-Based**  
**Tourism Policy**

**Terms of Reference**

---

**1. GENERAL INTRODUCTION**

The Jamaica Social Investment Fund (JSIF) was established in December 1996 as a component of the Government of Jamaica's strategy to reduce and eradicate poverty. JSIF helps to build local capacity to sustain and extend development initiatives.

The JSIF is an autonomous government company designed to provide investments in community-based projects island wide and is a demand-driven financial intermediary. It works in partnership with communities, the private sector, non-governmental organizations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

**2. BACKGROUND**

The Government of Jamaica has received a US\$15 million loan from the International Bank for Reconstruction and Development (World Bank) to implement the **Rural Economic Development Initiative (REDI) Project**.

REDI will provide grant funds to rural groups island-wide for the development of new businesses or increase of existing businesses in agriculture or tourism as well as strengthen national organizations to enhance their capacity to continue assisting the rural enterprises and other project partners and ensure the sustainability of the rural enterprises.

The grants funds for business development will be provided to groups under Component 1 of the REDI project, which consists of two types:

- **Type A:** small-scale revenue generating activities by rural enterprises in agriculture and rural tourism (maximum grant amount is US\$50,000.00).
- **Type B:** provision of critical small-scale public infrastructure, marketing and management (maximum grant amount is US\$200,000.00).

The Government of Jamaica, through the Jamaica Social Investment Fund (JSIF) and the **Ministry of Tourism**, aims to develop a **Community-Based Tourism Policy and Strategy**. The goals of the policy are for tourism to be the vehicle through which:

- Local people are enabled to utilize their rich talents and resources to transform their communities and enhance their livelihoods;
- Poverty is alleviated, gender equality and the empowerment of women are promoted, and Jamaica's delicate natural and cultural heritage is promoted and protected; and

- Jamaica's distinctive and diverse cultural and natural heritage is sought after by the discerning traveler.

The policy is therefore intended to provide modes of engagement for community based tourism initiatives to fulfill these goals. The policy will be in keeping with the community-based development objective of the Master Plan for Sustainable Tourism, which is intended to move the industry on to a path of sustainability.

This objective is for local communities to play a major role in defining, developing and managing the tourism experience. The Master Plan seeks to promote communities taking ownership of the industry and providing high quality visitor experiences, on which the success of the industry depends.

### **3. SCOPE OF WORK**

Under this tender, the client wishes to hire the services of a qualified consultant to, under the supervision of the Ministry of Tourism, prepare a Community-based Tourism Policy and Strategy. Following standard practice and format in the presentation of such documents, the Consultant is expected to complete the following tasks:

- 3.1. Offer a clear definition of "community-based tourism" based on literature review and stakeholder consensus;
- 3.2. Articulate the objectives of the policy to, among other things:
  - Support and encourage the development of community-based tourism enterprises in the small and informal sector;
  - Address the disadvantaged position of communities in the tourism marketplace; and
  - Involve local people in the planning of tourism activities.
- 3.3. Explore or define an applicable scope and significance of community-based tourism in the context of Jamaica's tourism development.
- 3.4. Define the policy scope.
- 3.5. Present a succinct Situational Analysis which should:
  - Examine the social, economic, political, technological and environmental context in which Jamaican communities are expected to do business in the local and international tourism marketplace;
  - Briefly review relevant national laws, policies, plans, strategies and programmes which may support or conflict with the objectives and outcomes of the community-based tourism policy, including (a) The Master Plan for Sustainable Tourism Development and (b) the Tourism Sector Plan of the National Development Plan – Vision 2030;
  - Evaluate the institutional framework, in particular within the Government of Jamaica, for community-based tourism development; and
  - Identify the strengths, weaknesses, threats, risks and opportunities which face Jamaican CBTEs.

- 3.6. Conduct a Gap Analysis which should:
- Determine the critical success factors for operating a CBTE;
  - Review different modalities to identify good practices and appropriate mechanisms for engaging communities; and
  - Recommend strategies for bridging the gaps which exist in the promotion, facilitation and operation of CBTEs.
- 3.7. Elaborate the government's position on:
- Creation of opportunities for communities to increase their involvement in the tourism industry;
  - Enabling greater access and rights to communities to potential tourism assets on Crown lands through appropriate systems and legal mechanisms, in order to develop CBTEs;
  - Exploring successful business models and examining how community members' access to affordable credit and financing can be facilitated;
  - Encouraging environmentally- and culturally-sustainable development of Crown lands for community-based tourism;
  - Fostering involvement of local people in decisions concerning planning and development of tourism in their communities;
  - Promoting partnerships with the formal tourism sector to co-operate and work with communities, in the interest of social responsibility and community development.
- 3.8. Develop strategies around a set of guiding principles which are in line with national objectives for improved equity, poverty alleviation, sustainable land use and tourism diversification and growth. These strategies should support CBTEs with respect to:
- Product diversification and growth of ecotourism, heritage tourism, agro-tourism, cultural tourism and other niche areas;
  - Identification of growth areas, opportunities and priorities;
  - Minimum licensing requirements and compliance procedures for CBTEs in the accommodation, attractions, food and beverage, shopping, transportation, tours, events and adventure sub-sectors;
  - Provision of marketing assistance, including market intelligence;
  - Capacity-building to meet the demands to successfully operate a CBTE, in particular training in business development training and product development;
  - Investment incentives;
  - Provision of technical advice and facilitation services by government agencies;

- Coordination and provision of policy guidance to NGOs, charities and donors that promote community-based tourism;
  - Enhancing financial support from government through established channels, towards social development and infrastructural improvement;
  - Stimulation of private sector investment in communities.
- 3.9. Develop an implementation plan which outlines actions and the roles and responsibilities of government agencies (including areas for inter-agency collaboration). The Consultant should also identify institutional responsibilities and required resources for community tourism;
- 3.10. Develop a monitoring and evaluation (M&E) framework for strategy implementation, including expected outcomes, outputs and performance indicators;
- 3.11. Coordinate and conduct national consultation sessions in which the penultimate draft of the Policy and Strategy is presented to communities, linked sectors and interest groups.

#### **4. QUALIFICATIONS AND EXPERIENCE**

The successful Consultant should possess the following minimum qualifications:

- Minimum Masters Degree in Tourism Management, Development Studies, Sociology or related field in the Social Sciences;
- Ten (10) to fifteen (15) years working experience in the tourism industry;
- Extensive experience conducting research and writing policy documents;
- Excellent qualitative and quantitative research skills;
- International and/ or regional experience in community tourism;
- Working knowledge of community dynamics and minimum five (5) years experience working with Jamaican communities;
- Experience in participatory methods;
- Project management skills;
- Familiarity with the Government of Jamaica's policies, plans and programmes;
- Awareness of sustainable development principles;
- Excellent knowledge of computer applications and the ability to generate reports and presentations.

N.B. International/ Regional Consultants are strongly advised to work with a Jamaican-based counterpart.

## **5. DELIVERABLES AND TIMELINES**

The Consultant will be expected to provide:

- (a) Work plan with timeline within one (1) week of signing contract
- (b) Literature Review to include situational analysis and gap analysis of existing policy, legislative and institutional framework for community-based tourism , Bibliography/ References cited and Appendices with list of persons and institutions interviewed, as well as discussion guides, survey instruments or other tools to be used to gather information; within two (2) weeks of signing contract
- (c) Draft Community-Based Tourism Policy and Strategy document within six (6) weeks of signing contract
- (d) Conduct national consultation sessions on draft policy document within nine (9) weeks of signing contract
- (e) Finalized Community-Based Policy and Strategy and Green Paper within eleven (11) weeks of signing contract
- (f) Implementation schedule and monitoring and evaluation framework within thirteen (13) weeks of signing contract

## **6. PAYMENT SCHEDULE**

- (a) 5% on submission and acceptance of work plan
- (b) 5% on submission and acceptance of situational analysis and gap analysis
- (c) 20% on completion and acceptance of draft Community-Based Tourism Policy and Strategy document
- (d) 20% on completion of national consultation sessions
- (e) 30% on completion and acceptance of Finalized Community-Based Policy and Strategy and White Paper
- (f) 20% on completion and acceptance of Implementation schedule and monitoring and evaluation framework

## **7. DURATION OF CONTRACT**

Four (4) months

## **8. PROCUREMENT SELECTION METHOD**

Individual Consultant