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BACKGROUND INFORMATION

1.1. Beneficiary country

Jamaica

1.2. Contracting Authority

Jamaica Social Investment Fund (JSIF)

1.3. Country background

Jamaica is the fourth largest island in the Caribbean with an estimated population of 2.7 million, of which 50% live in urban areas. Jamaica's economic performance has been stagnant in recent years. In terms of GDP, Jamaica is the fifth largest economy in the Caribbean but in terms of its per capita GDP, it is 19th. Since 1994, GDP growth has failed to keep pace with the growth of the population and this has led to higher rates of unemployment and social fragmentation. The Jamaican economy has also been experiencing a gradual structural transformation. This has involved the gradual decline of the Manufacturing sector and the concomitant increasing contribution to GDP of Service industries, particularly Tourism.

The structural transformation of the economy has resulted in changes in the spatial organization of towns and cities. Business and industrial activity have contracted, resulting in the increasing incidence of unemployment and poverty, particularly in the capital, Kingston. Jamaica's inner city communities are a major focal point for the increasingly high levels of crime and violence facing the country. This has resulted in declining investments nationally and the general unavailability of funds has resulted in inadequate maintenance and development of basic infrastructure and social service provision particularly in inner city communities.

Furthermore, children and youth in these communities are exposed to conditions that are challenging for their personal development and for meaningful participation in nation building. In particular, these challenges arise from social conditions common to inner city communities such as:

- High prevalence of single parent, female-headed homes
- High levels of exposure to environmental and personal violence
- Interrupted schooling due to factors such as violence, child labour and teenage pregnancy
- Low literacy and skills levels
- Hegemony of criminal gangs over wider community activities, and
- Need for greater support to structured activities promoting positive values and attitudes and personal development outcomes.

1.4. Current situation in the sector

The Government of Jamaica (GoJ) has sought to address the issue of poverty and the provision of a safety net to the most vulnerable in the society. In 1996, the Jamaica Social Investment Fund (JSIF) was established as a component of the GoJ's national poverty alleviation strategy. In fulfilling its mandate, the JSIF facilitates the empowerment of communities and assists in building national capacity to effectively implement sustainable community-based programmes aimed at social and economic development. The JSIF has considerable experience in financing community infrastructure projects in inner city communities – including those projects that provide or support critically needed water, sanitation, education, health and transport services, as well as a range of community-based capacity building initiatives to build social capital.

Poverty reduction efforts have suffered over the years from inadequate coordination and a lack of effective contact with the level at which real poverty-reduction activities and projects were located. Similarly, participatory poverty reduction was espoused but in practice hardly ever achieved. More recently however, these deficiencies have been recognized and serious attempts are being made to remedy them, albeit held back by budgetary limitations.

The GoJ has also sought to address national security and poverty in inner city communities through a number of initiatives like the Citizen Security and Justice Programme (CSJP), the Community Security Initiative, and the PATH programme and its sub-programmes. The Government is committed to building upon the successes of its poverty reduction programmes in inner city communities by deepening interventions in inner-city communities. There is also the government's Community Renewal Programme (CRP) which is a ten-year programme to be implemented in 100 communities in the focal parishes of Kingston, St. Andrew, St. Catherine, Clarendon and St. James.

As a manifestation of the GoJ's commitment to civic participation and strong performance in community-based service provision, the Social Development Commission (SDC) has formulated a framework to enhance civil society participation through a three-tiered system of public-civic committees. Community Development Committees (CDC) and Development Area Clusters are being formed at the neighbourhood and neighbourhood cluster levels, while Parish Development Committees (PDCs) have already been established in every parish in the country.

In an effort to contribute to poverty alleviation efforts, the European Union (EU) through the 9th and 10th European Development Fund (EDF) and the GoJ are funding the Poverty Reduction Programmes I, II and III (PRP I and PRP II) over an operational period of fifteen years starting in 2001. The purpose of the programme is the improvement in socio-economic conditions and quality of life in communities, with emphasis on the promotion of community safety and the reduction of criminal behaviour in volatile and vulnerable communities. In addition to providing funding and support for infrastructure projects that address issues such as water, sanitation, health and educational needs, the Poverty Reduction Programme also focuses on community empowerment through such initiatives as the Employment Internship Programme, the Vocational and Tertiary Scholarship Programmes, summer camps and training in such areas as personal development and parenting.

Building upon the experiences of the first two Poverty Reduction Programmes (PRP I (2001-2006), and PRP II (2007-2013), and drawing upon the commitment and flexibility of Non-Governmental Organizations, Community Based Organizations and Government Agencies, the PRP III will help to translate agreed community priorities into practical poverty-reducing activities and projects. Through encouraging close liaison and information exchange between all involved parties, PRP III will contribute to the coherence of poverty and crime related interventions. PRP III will deepen and broaden community participation, which in turn will help to instil a greater sense of ownership of subprojects and thus contribute substantially to their sustainability. Furthermore, the process of participation is expected to raise poor communities to a level of awareness of self-interest and citizenship, thereby leading to their increased involvement and responsibility in community and local government affairs.

The PRP has been designed to contribute to the alleviation of poverty in Jamaica by increasing the participation of poor communities in the choice and implementation of projects and by improving living conditions. Specifically, the PRP will improve the living conditions of the poor by providing access to quality basic infrastructure and services, especially in sanitation, water and health thereby contributing to inclusive growth and equitable development by promoting the economic well-being and enhanced quality of life for residents of volatile communities.

PRP III seeks to reach a critical impact by focusing on a limited number of volatile Communities.¹ This targeting of support will be guided by the strategic and/or phased roll out of the CRP as **PRP III** is added to the suite of interventions aligned to these communities.

¹ A volatile community is defined by the Ministry of National Security as a group of persons residing in a distinct geographic area who experience relatively high levels of violent crime in a consistent or erratic manner within the boundaries of the said geographic area over a sustained period of time.

The total cost of the project is estimated at:

- EUR 11.94 million for the PRP III

PRP III commenced on May 4, 2012 and is projected to run for 72 months (including a 2-year closure phase), ending in 2018 while the operational phase will end in 2016. The PRP III is designed to contribute to the implementation of the Government's Community Renewal Programme (CRP). PRP III targets the following four specific components of the CRP:

- (A) Governance
- (D) Physical Transformation
- (E) Socio-economic Development
- (F) Youth Development.

The PRP is implemented by the Jamaica Social Investment Fund (JSIF).

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 through:

- **Social Infrastructure** - includes the rehabilitation, expansion, construction & equipping of facilities such as schools, health centres, community centres, homes for the elderly and persons with disabilities, infirmaries; it also includes the construction and rehabilitation of public sanitary conveniences, drains, canals and community-based water systems.
- **Economic Infrastructure** - includes the rehabilitation and up grading of parochial, feeder and urban access roads and the construction and rehabilitation of community-based agro-processing facilities.
- **Social Services** - includes assistance to programmes offering services in career guidance and job placement, counselling (including conflict resolution & drug abuse), parenting and family life education, and skills training to the un-/under-employed and persons with disabilities.
- **Organisational Strengthening** - includes technical assistance and training for community-based organizations to assist them in developing and managing community-based projects and organizations, to governmental and non-governmental institutions in participatory project cycle management and improving the support they can provide to communities in managing community development initiatives

1.5. Related programmes and other donor activities

The **Inter-American Development Bank** (IDB) has supported a wide range of poverty-related activities, of which the funding of the Human Capital Protection Programme II, and the Integrated Social Protection and Labour Program, alongside its support for improved poverty monitoring and social analysis, are particularly relevant to poverty reduction. The IDB also contributes in the areas of primary education, citizen security and justice (including the MNS' Citizen Security and Justice Programmes, as well as support to NGOs and other service providers), environmental management, provides support for the Youth Development Programme and for HIV/AIDS prevention, all involving NGOs in the delivery of services including health education and rural water provision.

The **World Bank** (WB) has provided loan funding for financial sector reform, secondary education, community-based infrastructure improvements and HIV/AIDS prevention, treatment and care. In addition to Public Sector Modernization, the WB has supported the creation of the Jamaica Social Investment Fund, the National Community Development Project (NCDP), and the Inner City Basic Services for the Poor (ICBSP) project, and the provision of a Social Safety Net. It currently funds the Rural Economic Development Initiative (REDI), which works to improve socioeconomic conditions in rural Jamaican communities, and the Integrated Community Development Project (ICDP), which provides an integrated approach to crime and violence reduction and prevention in 18 underserved urban and peri-urban communities. Together with other activities

aimed at reducing inner-city poverty and violence and increasing income generation, the WB has also funded a series of case studies on best practices in poverty reduction.

The **United States Agency for International Development (USAID)** has been successful in NGO and governmental partnerships, which have helped to reduce environmental degradation, strengthened primary education, improve public health and encouraged economic growth. The USAID-funded Comet II projects, which built on the gains of Comet I, which worked to improve citizen security, with an emphasis on community-based processes.

The strategy of the **UK Department for International Development (DFID)** in the Caribbean is aimed at improving people's lives in the region through targeted development interventions in Wealth Creation, Governance & Security and Climate Change. In Jamaica, DFID's support focusses primarily on programmes in police accountability and effectiveness, community security and on anti-corruption initiatives. DFID Caribbean implements a blend of regional and bilateral programmes, and works closely with other donors, government agencies, regional and national institutions and civil society organisations across related sectors. In Jamaica, collaboration with local and international partners helps to ensure programmatic alignment with wider efforts to improve governance and security in Jamaica.

The **Canadian Department of Foreign Affairs, Trade and Development (DFATD)** strategic priorities have included: human rights, democracy and good governance; enhancing civil society; and the environment. In these initiatives, DFATD (formerly, CIDA) has worked in tandem with many government agencies and NSAs including the Ministry of National Security, Dispute Resolution Foundation, Peace and Love in Society (PALS), Ministry of Justice, Parish Councils, Parish Development Committees (PDCs) and civil society groups island-wide. The CSJP (Phase III) is presently being supported by DFATD. The Enhancing Civil Society Project (ECSP) strengthens the capacity of CBOs to act as community catalysts while concurrently deepening their interest in and their understanding of civil society issues within the Jamaican context.

The **Caribbean Development Bank (CDB)** has as its main purpose, the goal of contributing to the economic growth and development of its member countries within the Caribbean. The CDB currently finances two projects being implemented by JSIF: one loan – the Community Investment Project (CIP) – and one grant – the Basic Needs Trust Fund (BNTF 7). The primary objective of the CIP is to improve the socio-economic conditions of poor communities by increasing their access to basic social and economic infrastructure, social services and organizational strengthening activities which meet their needs and priorities. It is anticipated that at the end of the project, 130 communities will benefit from access to improved quality education, road and health infrastructure. BNTF 7 will seek to reduce poverty and vulnerability through providing enhanced community access to basic social and economic infrastructure and human resource development services. BNTF 7 will provide resources for implementation of sub-projects and support to improve the capacity of Community-Based Organizations (CBOs) in the application of participatory approaches for planning and monitoring of sub-projects and decision-making.

Sub-projects will be considered from the following sectors: a) Education and Human Resource Development; b) Water and Sanitation Improvement; and c) Basic Community Access and Drainage Improvement.

The Government of Japan through the Japan Policy and Human Resources Development Fund (PHRD) Fund was established in 1990 as a partnership between the Government of Japan and the World Bank. The PHRD supports a wide range of poverty alleviation and capacity building activities within member countries of the World Bank. The Government of Japan has also provided community crime- and violence-prevention, capacity building and poverty alleviation support to Jamaica through the form of a US\$2.7M grant from the Japan Social Development Fund (JSDF), which was active for the years 2009-2013. The Grant allowed for the creation of the Jamaica Crime Observatory (an integrated crime and violence information system), among other activities.

Several United Nations agencies are also active in Jamaica: for instance, UNICEF has supported programmes around education, child protection, emergency preparedness and health (particularly, HIV/AIDS). UNESCO is supporting both Cultural Industries and the Database on community-based Youth organizations. UNDP is particularly active with many of its projects being implemented through NGOs. UN Women recently established an office in Jamaica and hopes to focus on gender-based violence reduction and prevention.

OBJECTIVE, PURPOSE & EXPECTED RESULTS

1.6. Overall objective

The purpose of the PRP III is to contribute to inclusive growth and equitable development by promoting economic well-being and enhanced quality of life for residents of volatile² communities. It contains two components (1) construction of socio-economic infrastructure and (2) community empowerment aiming at reinforcing local development dynamics.

Development programmes such as the PRP, designed to address the socio economic needs of communities and, further, to improve the overall quality of life in communities, demand that robust assessments of the communities and beneficiaries are done. These assessments will form the basis on which, i) development baselines are established, ii) monitoring and evaluation frameworks designed and iii) beneficiaries are tracked to establish the impact of the PRP Intervention.

To facilitate smooth and effective coordination of the PRP and any other relevant development programmes, a robust framework and template should be used to capture baseline data and longitudinal data that track the impact of the programme on beneficiaries over a five-year post-intervention period, and formulate monitoring and evaluation frameworks. The establishment of such a framework will enhance the effectiveness of the PRP and similar programmes.

Based on the foregoing, the PRP views the development of such a framework as a fundamental input to achieving the stated objective of the Programme, which is to empower residents of communities to achieve their fullest potential and contribute to the attainment of a secure, cohesive and just Jamaican society as outlined in Goals 1 and 2 of Vision 2030.

1.7. Purpose

The purpose of this contract named “*Baseline Study Desk Research & Analysis - Jamaica*” is to produce a summary analysis of baseline findings that will be used to measure the impact of the programme’s interventions on the beneficiaries thereby facilitating reliable ex-post evaluation of the PRP.

The scope of the consultancy involves using secondary data sources in order to establish baseline data for the PRP/CRP communities.

The PRP III communities are:

Kingston

- 1 Allman Town
- 2 Fletchers Land
- 3 Hannah Town / Craig Town
- 4 Jones Town
- 5 Rema

² A volatile community is defined by the Ministry of National Security as *a group of persons residing in a distinct geographic area who experience relatively high levels of violent crime in a consistent or erratic manner within the boundaries of the said geographic area over a sustained period of time.*

- 6 Arnett Gardens
- 7 Campbell Town
- 8 Central Downtown
- 9 Denham Town
- 10 East Downtown
- 11 Franklyn Town
- 12 Greenwich Town / Newport West
- 13 Majesty Gardens
- 14 Rae Town
- 15 Rose Town
- 16 Tivoli Gardens

St Andrew

- 17 Penwood
- 18 Waterhouse
- 19 Cockburn Gardens
- 20 Delacree Park / Union Gardens
- 21 New Haven
- 22 Riverton City
- 23 Whitfield Town

St Catherine

- 24 Central Village
- 25 Bog Walk
- 26 Old Harbour
- 27 Spanish Town Central

Clarendon

- 28 Four Paths
- 29 Palmers Cross
- 30 York Town
- 31 Lionel Town

St James

- 32 Flanker
- 33 Granville
- 34 Norwood
- 35 Adelphi
- 36 Anchovy
- 37 Barrett Town
- 38 Lilliput
- 39 Retirement
- 40 Tucker

The full list of CRP communities is available on request.

1.8. Results to be achieved by the Contractor

The consultant will carry out discussions with critical stakeholders, as well as use secondary research to provide the following:

- (a) Comprehensive listing of required data based on analysis of required programme output indicators and on consultations with and feedback from critical stakeholders
- (b) Listing of required primary and secondary data that was not available or accessible for desk review and analysis

- (c) Report with summary analysis of the data collected, reviewed and analysed, to form a baseline position for the programme as at an established date

ASSUMPTIONS & RISKS

1.9. Assumptions underlying the project

- Information needed is available and accessible
- There is cooperation from critical stakeholders

1.10. Risks

- Information is either not available or not accessible
- Extent of missing data may compromise the quality of the study/review/analysis
- Inability to contact key stakeholders

SCOPE OF THE WORK

1.11. General

1.11.1. Project description

The Consultancy involves (a) the establishment of data needs (b) the collection of secondary data to satisfy the data needs and (c) the collation and analysis of the relevant data deduced therefrom (d) to form/develop a relevant baseline position of the CRP Communities in the 5 PRP III parishes as at a time close to the start date of PRP III. This baseline data should incorporate the objectives of the programme.

This baseline review will analyse such secondary data/ indicators to be tracked as:

- a. Crime and violence, deviance, recidivism, labour market transition for youth and other related statistics.
- b. Reports and/or studies undertaken in the communities.
- c. Additional sources of information such as Censuses, Surveys of Living Conditions, Labour Force Surveys, Planning Institute of Jamaica's Poverty Maps, SDC Community Profiles, etc.

This will involve:

- Consultation with key stakeholders in the local development arena – key amongst those being the Planning Institute of Jamaica (PIOJ) and the Social Development Commission (SDC) – to determine the current development approaches and priorities. Other important national social and utility service providers include, but are not limited to: Child Development Agency (CDA), Department of Correctional Services: Probation Office - one in Clarendon; two each in Kingston & St. Andrew, St. Catherine, and St. James, Jamaica Public Service Co. Ltd., Ministry of Education: Regional Educational Offices, Ministry of Health: Parish Medical Officers of Health, Ministry of Justice: Victim Support Unit, Ministry of Labour & Social Security (particularly, PATH), National Solid Waste Management Authority (NSWMA), National Water Commission (NWC), and the Police (JCF & ISCF).

- In respect of the 40 PRP III Communities outlined in *Section 2.2* of this Terms of Reference, where profiles exists, undertake a desk analysis to determine: (a) what information is current and may be used for the indicator baselines; and (b) the gaps to be filled. The approach will require the use of more recent studies and/or publications.
- Where profiles do not exist for any of the specified communities, this lack should be noted and the data must be captured through the collation of extant information.
- Production of a baseline report for the PRP communities.

Any sampling technique employed in the gathering of data/information must be in full compliance with the principles of sound statistical analysis; such as ensuring that emphasis being placed on representative sampling rather than mere sample size. Justification of the procedure employed must be clearly delineated in non-technical terminology.

1.11.2. Geographical area to be covered

Jamaica

1.11.3. Target groups

- Critical programme stakeholders
- National data collection agencies

1.12. Specific work

The scope of work to be undertaken by the consultant includes:

Consultation with critical stakeholders of the programme; review PRP III's key and related documents, such as the PRP III Financing Agreement, the Programme's Logframe; the PRP III inception report and Ministry Paper No. 13, 1997 in order to gain background knowledge to adequately contextualize the purpose of the study. The Consultant must also observe the latest Practical Guide and the Communication and Visibility Manual for EU External Actions concerning acknowledgement of EU financing of the project. (See http://ec.europa.eu/europeaid/work/visibility/index_en.htm.)

1. Interview the: a) PMU, to discuss the expected scope of the study; and b) PRP III social team, to establish the context and background for sub-projects funded by JSIF in the past.
2. Preparation of an Inception report with a detailed work plan with implementation timelines, comprehensive research methodologies and an outline to be used for the Final Report.
3. Undertake a baseline review of data for the PRP/CRP Communities in the 5 PRP III parishes using available secondary sources of data and where available primary sources. The consultancy will:
 - Determine data needs
 - Access and collect available data for analysis e.g.
 - Socio-economic Survey of PRP III communities to include but not limited to demographic information, education/skills, employment, housing stock, sanitation and basic infrastructure.
 - Crime and violence, deviance, recidivism, labour market transition for youth and other related statistics.
 - Community Asset Mapping of infrastructure and critical social assets of development partners such as donors, state agencies, community organizations etc. and ii) Needs Assessment of: a) community groups/at risk community members and their capacity profile in PRP III communities;

- Reports and/or studies undertaken in the communities.
 - Additional sources of information such as Censuses, Surveys of Living Conditions, Labour Force Surveys, Planning Institute of Jamaica’s Poverty Maps, SDC Community Profiles etc.
 - Undertake desk study of existing data and identification of gaps in available data
4. Preparation of a Draft Final report and Power Point presentation of the findings. The findings from the baseline research must present: (a) synthesized analysis across **the specified** PRP III communities, (b) disaggregated analysis for **each** PRP III community
 5. Prepare a Final analytical report and Power Point presentation of the findings including the feedback to the Draft Final Report from the PRP. The findings from the baseline research must present: (a) synthesized analysis across **the specified** PRP III communities and (b) disaggregated analysis for **each** PRP III community.

Any sampling technique employed in the gathering of data/information must be in full compliance with the principles of sound statistical analysis; such as ensuring that emphasis being placed on representative sampling rather than mere sample size. Justification of the procedure employed must be clearly delineated in non-technical terminology.

1.13. Project management

1.13.1. Responsible body

The Jamaica Social Investment Fund

1.13.2. Management structure

The overall responsibility for the implementation of the programme lies with the National Authorizing Officer represented by the Planning Institute of Jamaica. In accordance with Article 35(1) of Annex IV to the Cotonou Agreement, the day-to-day implementation responsibilities will be entrusted to the Jamaica Social Investment Fund under the supervision of the Planning Institute of Jamaica. The Contracting Authority for the Programme shall be the Planning Institute of Jamaica. The executive responsibility for the PRP III implementation lies with the Steering Committee, which will be guided by the list of eligible communities submitted by the CRP Secretariat.

The PRP III Steering Committee will oversee and validate the overall direction and policy of the Programme. Meeting quarterly, or more frequently as required, it will recommend and approve Projects based on succinct Appraisal Reports on each, by the Implementing Agency, and will determine the proper strategy for the NGO capacity building component, and oversee all other matters related to the timely achievement of the objectives set out in the PRP III Log Frame.

1.13.3. Facilities to be provided by the Contracting Authority and/or other parties

None

LOGISTICS AND TIMING

1.14. Location

The consultant will be required to travel within/across the island – Jamaica.

1.15. Start date & period of implementation

The intended commencement date is September 28, 2015 and the period of implementation of the contract will be eight (8) weeks from this date. Please refer to Articles 4 and 5 of the Special Conditions for the actual commencement date and period of implementation.

REQUIREMENTS

1.16. Staff

Experts will be subject to approval by the Contracting Authority before the start of the implementation. This Terms of Reference contains expert profiles and the tenderer will have to demonstrate in the offer that they have access to experts with the required profiles.

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

1.16.1. Key experts

Key experts have a crucial role in implementing the contract. These terms of reference contain the required key experts' profiles. The tenderer shall submit CVs and Statements of Exclusivity and Availability for the following key experts:

Key expert 1: Team Leader

Qualifications and skills

The Consultant should possess the following:

- A minimum of a Masters Degree in related Social Science Discipline such as Community Development, Development Studies, Social Policy, Psychology, Behaviour Change Modification or Sociology
- Knowledge and experience with the following:
 - Research methodologies
 - Statistical Package for Social Sciences (SPSS) and at least one qualitative software such as ATLAS.ti and NVivo.
 - Microsoft Word, Excel, and Access.

General professional experience

- At least five (5) years experience working on similar assignments requiring:
 - Inter-agency partnerships at the community level
 - Report preparation for Government Agencies or International organizations.
 - Statistical Package for Social Sciences (SPSS) and at least one qualitative software such as ATLAS.ti and NVivo.
 - Proficiency in Microsoft Word, Excel, and Access.

Specific professional experience

- At least five (5) years experience working on similar assignments requiring:
 - Programme/Project development, monitoring and evaluation
 - Research methodologies
 - Partnership with government, international agencies and non-government sectors in peri-urban and urban area, preferably inner-city communities.

All experts must be independent and free from conflicts of interest in the responsibilities they take on.

1.16.2. Non key experts

CVs for non-key experts should not be submitted in the tender but the tenderer will have to demonstrate in their offer that they have access to experts with the required profiles.

The Contractor must select and hire other experts as required according to the profiles identified in the Organisation & Methodology. All experts must be independent and free from conflicts of interest in the responsibilities they take on.

1.16.3. Support staff & backstopping

The Consultant shall select and hire other experts as required according to the needs. The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience.

Cost for backstopping and support staff, as needed, are considered to be included in the financial offer of the tenderer.

1.17. Office accommodation

Office accommodation for each expert working on the contract is to be provided by the Consultant.

1.18. Facilities to be provided by the Contractor

The Consultant shall ensure that experts are adequately supported and equipped. In particular it shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

1.19. Equipment

No equipment is to be purchased on behalf of the Contracting Authority / partner country as part of this service contract or transferred to the Contracting Authority / partner country at the end of this contract. Any equipment related to this contract that is to be acquired by the partner country must be purchased by means of a separate supply tender procedure.

REPORTS

1.20. Reporting requirements

The consultant will submit the following reports in English in one original, three hard copies and one electronic copy:

- **Inception Report** of maximum 20 pages (main text, excluding annexes) to be produced within 10 calendar days from the commencement of the implementation. In the report the consultant shall provide a summary of the existing situation, a detailed work plan with implementation timelines, the comprehensive research methodology, as well as an outline for the Final Report which shall include inter alia, an executive summary, data reviewed, missing data, key results and findings, analysis of results and findings, recommendations for project development and impact. The Contracting Authority shall subsequently have five (5) working days within which to forward their comments to the Consultant. The consultant is advised to proceed with his/her work in absence of comments by the Contracting Authority to the inception report outside that limit.
- **Draft final report** of maximum 150 pages (main text, excluding annexes) in Microsoft Word and a Power Point presentation of maximum 40 pages which shall be submitted no later than 15 calendar days before the end of the period of implementation of tasks. The report should give: a short description of progress

including problems encountered, an indication of any missing data, the findings from the review and analysis of the data collected, general recommendations to include a suggested baseline date. The Contracting Authority shall subsequently have five (5) working days within which to forward their comments to the Consultant. The consultant is advised to proceed with his/her work in the absence of comments by the Contracting Authority to the draft report outside that limit. The draft final report must be provided along with the corresponding invoice.

- **Final report** with the same specifications as the draft final report, incorporating any comments received from the concerned parties on the draft report. The final report and final Power Point shall be provided by the latest 5 days after the reception of the comments on the draft final report. The detailed analyses which underlie the mission's recommendations will be presented in annexes to the main report. The final report must be provided along with the corresponding invoice.

1.21. **Submission & approval of reports**

The report referred to above must be submitted to the Programme Manager, Dr. Eleanor Henry at the JSIF. The Programme Manager is responsible for approving the reports

MONITORING AND EVALUATION

1.22. **Definition of indicators**

The indicators of successful delivery of the services include:

- Comprehensive completion of the scope of works fully addressing the general description (section 4.1) and the specific activities (section 4.2) of the consultancy.
- Timely completion of the consultancy in keeping with sections 5.1 and 5.2.
- Provision of the required analytical reports, in the prescribed Microsoft Word format within the given timelines (section 7), with annexed data sets.

1.23. **Special requirements**

An invitation for Expressions of Interest will be sought ahead of the distribution of Tender Dossiers. Interested persons will be asked to indicate their interest by completing Annex A to this Terms of Reference.

* * *

Annex A

Poverty Reduction Programme

EXPRESSION OF INTEREST (EOI) SUBMISSION FORM

Important Notice

The documents submitted with the Expression of Interest (EOI) must contain sufficient information to enable a comprehensive assessment of the Individual or Firm to be carried out. The information submitted will form the basis on which the scoring will be done and will determine whether or not the Individual or Firm is shortlisted.

**I. TEMPLATE OF EXPRESSION OF INTEREST
Submission Letter**

Location:.....

Date:

To:

The Programme Manager
Poverty Reduction Programme
C/O Jamaica Social Investment Fund
Ground Floor
The Dorchester
11 Oxford Road
(entrance on Norwood Avenue)
Kingston 5

I/We, the undersigned, offer to provide the consulting services for ***Baseline Study Desk Research & Analysis – Jamaica*** in accordance with your Expression of Interest (EOI) notice dated _____ . We herewith submit our EOI as per the instructions provided.

We understand you are not bound to accept any EOI you receive.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

Seal of the Firm:

Description of the Individual*/Firm

***Individual Consultants are requested to submit their resume.**

II.

1. Information of Firm

FIRM
Name of the Firm:
Address:
Telephone No.:
Fax No.:
Email:
Date of Registration:
<u>Contact Person:</u>
Name:
Designation:

2. Legal Documents

For verification purposes the firm shall submit:

- Copies of company's registration documents

3. Company Profile and Organization Structure

Provide a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment. In this section the Firm shall also provide the following information:

- Brief company profile covering its:
 - Objectives,
 - Working areas,
 - General experience
 - Organization structure.

4. Key Experts/Human Resources Available to assist the Individual or Firm**

** Please also submit the CV of each person listed.

Provide the information in the following table. Please provide information about professional staff that is available to the individual/firm and who will form part of the implementation of this consultancy.

KEY EXPERTS

Name of expert	Proposed position	Years of experience	Age	Educational background	Specialist areas of knowledge	Experience in beneficiary country	Languages and degree of fluency (VG, G, W)

III. Experience of the Firm

4. Information Regarding Experience of the Firm

1. Specific Experience of the Firm:

Name of Project/ Location	Client Name and Address	Start Date	Completion Date	Description of work

IV. Evaluation Criteria & Sub-Criteria

Criteria, Sub-Criteria	Weighting (Points)
1. Consultant's General Experience	25
<ul style="list-style-type: none"> • General Experience of the Consultant relevant to the assignment <ul style="list-style-type: none"> ○ Established and in operation and undertaking baseline assignments including data collection and analysis for more than eight (8) years – 25 points ○ Established and in operation and undertaking baseline assignments including data collection and analysis for between five (5) and eight (8) years – 15 points ○ Established and in operation and undertaking baseline assignments including data collection and analysis for between one (1) and four (4) years – 10 points 	
2. Consultant's Specific Experience	35
<p><i>a. Specific Experience of Consultant [as per EOI]</i></p> <ul style="list-style-type: none"> a. Undertaken more than five (5) similar assignments (i.e. baseline study and analysis and worked with donor funding agency) as outlined in ToR) – 35 points b. Undertaken between three (3) and five (5) similar assignments (i.e. baseline study and analysis and worked with donor funding agency) as outlined in ToR) – 25 points c. Undertaken between one (1) and two (2) similar assignments (i.e. baseline study and analysis and worked with donor funding agency) as outlined in ToR) – 20 points 	
3. Technical competence	20
Consultant has relevant academic qualifications	
4. Experience Working with Inner-City and Underserved Communities	20
<ul style="list-style-type: none"> ○ Undertaken work assignments in inner-city and underserved communities for five (5) or more years – 20 points ○ Undertaken work assignments in inner-city and underserved communities for less than five (5) years – 15 points 	
Total Points	100
Minimum Required Points to be Shortlisted	70