

**JAMAICA SOCIAL INVESTMENT FUND**  
**BASIC NEEDS TRUST FUND – NINTH CYCLE**  
**TERMS OF REFERENCE**

**Institutional Strengthening in Gender Mainstreaming**

**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. Recognising the limited capacity of existing government institutions to implement small-scale projects at the community level, Cabinet in December 1995, approved the establishment of the JSIF as a key component of the Government's National Poverty Eradication Programme (NPEP). JSIF invests in community-based projects as a means to empowering communities and building social capital. By involving communities fully in prioritising, planning, managing and monitoring their own development projects, 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 organisations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

The JSIF promotes, appraises, finances and supervises sub-projects in the following areas:

**Social Infrastructure** - includes the rehabilitation, expansion, construction & equipping of facilities such as schools, health centres, homes for the elderly and persons with disabilities, infirmaries, community centres; 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 organisations to assist them in developing and managing community based projects and organisations, 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.

## **2a. Background/Description of project**

This project will be funded through the Caribbean Development Bank/Basic Needs Trust Fund Ninth Cycle (BNTF 9). The main objective of BNTF 9 is to reduce poverty and vulnerability through enhanced access to basic social and economic infrastructure and human resource development services. This project is under the institutional strengthening component of the grant, which seeks to enhance the technical abilities of all stakeholders in the execution of development initiatives under the grant.

It is increasingly recognized that efforts towards development must be holistic and to this end, issues such as gender inequality must be taken into account. The Vision 2030 Jamaica: National Development Plan specifically outlines gender as a key strategic priority to be addressed. The Gender Sector Plan outlines key objectives to be achieved towards mainstreaming gender in development planning and action. Additionally, Jamaica is signatory to key international treaties and conventions for gender equality such as Committee on the Elimination of Discrimination against Women (CEDAW), Convention of Belem do Para and the Beijing Platform for Action.

The National Policy for Gender Equality (NPGE) was approved in 2011, with a primary goal to ensure the principle of equality between women and men. The NPGE outlines Jamaica's commitment to addressing the long-term systemic forms of discrimination both direct and indirect against women in the public and private spheres, identifying and overcoming the limitations to the empowerment of women and men and ultimately creating a society that values gender equality.

The NPGE, therefore, sets the framework for a more comprehensive and coordinated approach to fully integrate gender in every area of national life. It is geared towards achieving equal treatment for women and men through equal visibility, equality of opportunity, equal access to all resources, and equal participation in all areas of public and private life. This goal is intended to be accomplished through the implementation of the NPGE.

The Bureau of Gender Affairs is the entity with responsibility for the oversight of the implementation of the policy.

## **2b. Description of Project Beneficiaries**

The recipient of the services will be the Bureau of Gender Affairs (BGA).

## **2c. Specific Problem to be addressed**

There continue to be ongoing efforts to integrate gender equality in national policy frameworks, programmes, projects, organizational operations and community relations; towards ensuring that Jamaica performs in alignment with human rights regulations, best practices, the International Conventions and the Vision 2030 Jamaica: National Development Plan. The NPGE was approved in 2011 with the following objectives:

- To reduce all forms of gendered discrimination and promote greater gender equality and social justice.

- To strengthen institutional mechanisms and develop the skills and tools required to mainstream gender in cultural, social, economic, and political institutions, structures, and systems.
- To promote sustainable behaviour change and improve organizational effectiveness and the capacity of public sector entities to develop, implement and monitor gender responsive plans, projects, programmes, and policies.

In accordance with the Jamaican Constitution, policies should be reviewed after a five (5) year period to ensure they remain current in their response to the issues they are addressing. The NPGE is now in its eighth (8<sup>th</sup>) year and therefore the review is overdue.

There is an urgent need to review and evaluate the policy to indicate whether the targets have been met, and facilitate the revision of same in response to emerging trends. A revised NPGE will enable the Government of Jamaica (GOJ) to further meet its obligations under a number of national, regional and international gender and development commitments such as the Planning Institute of Jamaica's (PIOJ) Medium Term Framework, the Beijing Platform of Action and the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW).

### **3. Objectives of the Consultancy**

To conduct a comprehensive evaluation, review and revision of the Government of Jamaica's National Policy for Gender Equality (NPGE, 2011).

### **4. Scope of Work**

The consultant will collate data from specific primary and secondary sources using the appropriate research methodologies in the fulfilment of the above objective.

Specifically, the Consultant Organization shall:

1. Review relevant national, regional and international documents to develop an understanding of the scope of the evaluation of the National Policy for Gender Equality (NPGE). Documents to be considered are:
  - Vision 2030 Jamaica: National Development Plan
  - PIOJs Medium Term Framework 2019
  - Gender Strategic Plan (PIOJ's Gender Sector Plan, BGA's NPGE & NSAP-GBV)
  - GoJ's commitments under specific conventions, and agreements etc.
2. Conduct a desk review of relevant MCGES/BGA strategic and operational documents and interview relevant MCGES/BGA staff to develop an understanding of the BGA's mission, strategic objectives and focus, corporate priorities, expected outcomes, and the policy and operating framework within which they are implemented.
3. Conduct three (3) National Stakeholders' Consultation Sessions- Hold discussions with internal (MCGES/BGA) and external stakeholders to obtain perspectives on the implementation and achievements of the current NPGE, gender and development issues and approaches to addressing the shortcomings of the NPGE including within

the context of gender mainstreaming. Entities to be engaged include NPGE Pg 25-30<sup>1</sup>, *inter alia*:

- I. Ministries Ministry of Science Energy and Technology(MSET), Ministry of Economic Growth and Job Creation (MEGJC), Ministry of Health (MoH), Ministry of Labour and Social Security (MLSS), Ministry of Foreign Affairs and Foreign Trade (MFAFT), Ministry of National Security (MNS), Ministry of Justice (MoJ)
  - II. Departments DCFS, Cabinet Office, Post & Telecommunications)
  - III. Executive Agencies (PIOJ, Maritime Authority of Ja, OCA,NEPA, SDC SRC,WCFJ, NFPB, CPFSA)
  - IV. Other – Institute for Gender & Development Studies (IGDS)
  - V. International Development Partners - IDPs (UNDP, UNFPA)
  - VI. NGO's (MoGAVA, Woman Inc, JNRWP (Network of Rural Women Producers), WMW, JWPC, Red Cross, Yard Empire, Yard Vibes, Eve For Life, CariMAN, Youth groups, Association representing PWDs)
  - VII. CBOs (PMI, CSJP, Chamber of Commerce, Business groups, PTA)
- Outline nature of their participation planned outputs/outcomes, actual outcomes, the extent of variance and reasons for any shortfall or success.
  - Comprehensively document research findings via, reports and PowerPoint documents.
4. Conduct an in-depth review of the policy instrument itself based on the established M&E Framework (as outlined in the NPGE<sup>2</sup>), assessing and an assessment of how the Policy was operationalised:
    - The extent to which the goals, objectives and targets of the policy were achieved;
    - Review the extent of effectiveness of the strategies and tools outlined in the policy, as implemented by the GoJ
    - Recommend any changes to be made to the M&E framework to include but not limited to the refinement of indicators and planned targets.
  5. Compile a revised National Policy for Gender Equality (NPGE) with the following additional features:
    - Results Based Management Monitoring and Evaluation Framework to better guide implementation and monitoring of the revised policy, and to enhance the effectiveness of the programme going forward.
    - Include recommendations to enhance the effective adoption/implementation of the revised policy

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<sup>1</sup>To date, twenty-seven (27) MDAs have submitted an Action Plan in compliance with the National Policy for Gender Equality (NPGE) and have been awarded with the Gender Equality Seal (GES) to be a gender-certified entity.

<sup>2</sup>Pg 32 & Appendix 2

6. Develop a targeted key stakeholder Communication Strategy to support the revised policy.  
Include a feedback and reporting mechanism which allows all stakeholders to capture their contribution as part of the overall policy action. The mechanism should be standardized to facilitate the BGA easily collating and creating high level reports. This instrument will be critical in keeping stakeholders informed and to effect decision making.
7. Conduct a validation workshop with *KEY* stakeholders to ensure that the perspectives and recommendations are accurately captured and represented. The workshop should also introduce the communication strategy to the stakeholders to ensure the proposed channels, mediums, etc are appropriate and cover the required groups etc.

## 5. Deliverables

The Consultant Organization shall provide the JSIF Project Officer with the following:

1. Draft Inception Report detailing a work plan, draft interview Instruments for stakeholder consultations and schedule for completing the consultancy; and including a list/database of documents, organisations and individuals considered as important sources of information for the policy review, evaluation and revision. ***To be submitted within two (2) weeks of commencing the consultancy***
2. Submit Final Inception Report with comments integrated in the document (feedback from the BGA and JSIF on the draft will be received with within 7 working days of submission). ***To be submitted four (4) weeks after contract signing.***
  - An Annotated Programme, Communication Plan and implementation schedule for conducting the three (3) national stakeholders' workshops should be included
3. Submit Situational Analysis based on the items listed at 4.1 to 4.4. i.e. Review of National, Regional and International Gender Frameworks, desk review and stakeholder consultations. ***Due sixteen (16) weeks after contract signing.***

Outline stakeholder consultations held (which groups/organizations, sectors, positions of persons in their entity, composition of cohort disaggregated by sex and age)

4. Prepare a comprehensive Socio-economic and Gender Analysis (should include for example analysis of equal pay, employment benefits, access to credit and public resources through safety net schemes in accordance to the items outlined in 4.4 and 4.5. i.e. National Stakeholder Consultations and review of existing policy instrument. The evaluation of the present NPGE should include the effectiveness of the strategies and tools outlined in the NPGE, 2011, as implemented by the GOJ; achievements or lack therefore of the implementation, based on the monitoring and evaluation framework.

Additionally, the analysis should indicate a comparison of previous and current state regarding gender related concepts of equality, equity, GBV, access to resources, power etc.

- a. Prepare a PowerPoint presentation of the findings to be presented to a multi stakeholder group. *To be submitted 24 weeks after contract signing.*
- b. Submit a report based on feedback from the presentation. *To be submitted 26 weeks after contract signing.*

5. Submit draft **revised** NPGE Policy with the following included:

- Implementation plan/ strategy
- M&E Framework

Consultation must be done with stakeholders regarding the proposed approach, strategies and tools going forward.

*To be submitted 32 weeks after contract signing.*

6. Submit Draft Key Stakeholder Communication Strategy to support the revised NPGE. *To be submitted 36 weeks after contract signing.*

7. Submit Final Project Report which includes:

- Final revised NPGE
- Monitoring and Evaluation Framework associated with the revised NPGE Policy
- Implementation plan/strategy
- Final Communication Strategy
- Annexes: Report on each stakeholder engagement, brief report on stakeholder validation workshop – critical feedback from stakeholders, with their recommendations for implementation going forward

*To be submitted 40 weeks after contract signing.*

### **OTHER REQUIREMENTS**

- The consultant is required to liaise with the BGA for the execution of this consultancy as they are the recipients of these services. However, all contractual queries regarding deliverables, timelines, payments etc should be directed to JSIF.
- Project meetings will be held every two (2) months to allow all parties to remain abreast of the progress of the consultancy. Meeting will cover progress to date, upcoming deliverables, challenges, contract schedule etc.

**Note:** The work presentation for deliverables 5.1 to 5.7 is incomplete without submission of the following:

- a) Three hard copies and one electronic copy in word format (on CD or jump drive) of reports.
- b) One electronic copy of primary research data collected is to be submitted with relevant reports (on CD or jump drive). Primary data sets through quantitative SPSS software and qualitative software (NVivo).

Task	Deliverable	Date Due After Contract Signing
Task 1	Draft Inception Report	Week 2
	Final Inception Report	Week 4
Task 2	Situational Analysis	Week 16
Task 3	Power point presentation of findings from Socio-economic and Gender Analysis	Week 24
	Report on Socio-economic and Gender Analysis	Week 26
Task 4	Submit Draft Revised Policy	Week 32
Task 5	Submit Key Stakeholder Awareness Strategy	Week 36
Task 6	<i>Final</i> Report with Revised policy, M&E Framework and Implementation Plan and Final Communication Strategy	Weeks 40

## 6. Contract Period

The consultancy will be valid for a period of ten (10) months. The timeline begins from the signing of the contract.

## 7. Provisions of the Consultancy

The BGA will be responsible for providing the Consultant(s) with relevant administrative and logistical support for the execution of the assignment.

## 8. Payment Schedule

1. 30% upon submission and approval of Deliverables 5.1 and 5.2
2. 20% upon submission and approval of Deliverable 5.3
3. 20% upon completion and approval of Deliverable 5.4
4. 30 % upon submission and approval of Deliverable 5.5, 5.6 and 5.7

All receipts related to reimbursable expenses must be submitted within the prescribed payment schedule above.

**Note:** Payments are contingent on JSIF's approval of the satisfactory completion of deliverables.

## 9. Reporting relationship

Prior to the start of this assignment, there will be an initial briefing with the Bureau of Gender Affairs and the JSIF Project Team. This briefing will set the general parameters and confirm scope of the assignment. While all day to day operational matters will be within the remit of the BGA for the duration of the consultancy, any adjustment which significantly deviates from the initial scope of the assignment, the agreed time or cost must be agreed in writing between the JSIF and the BGA. All contractual matters are to be reported to the JSIF.

## 10. Method of Selection

Consultant's Qualification Selection

## 12. Evaluation Criteria

The JSIF will evaluate all bids using quality and price criteria. Bidding firms must demonstrate their ability to deliver the requirements and must respond to ALL the criteria outlined below.

*Expression of Interest (100 points) – Minimum 70 points*

*Firms should undertake evaluations as a core function and have demonstrated strong track record in gender based research analyses.*

*A brief statement [max. 500 words] of the firm's capabilities must be provided.*

- General Experience of the Consultancy Firm relevant to the assignment (35 points)
  - In operation and undertaking various types of evaluation consultancies, and other related initiatives for **more than** eight (8) years (35 points)



- In operation and undertaking various types of evaluation consultancies, and other related initiatives for five (5) to eight (8) years (25 points)
- In operation and undertaking various types of evaluation consultancies and other related initiatives for one (1) to four (4) years (15 points)
- Specific Experience of the Firm (45 points)
 

*Firms should demonstrate prior experience working on gender-based research, evaluation and activities such as projects, formulation or implementing policy, building awareness, and training different target groups a clear outline of the name of the assignment, services provided, cost, and duration and client/agency should be submitted*

  - Undertaken **more than** five (5) similar assignments (i.e. gender based research, evaluation and action as outlined in TOR) – 45 points
  - Undertaken between three (3) and five (5) similar assignments (i.e. gender based research, evaluation and action as outlined in TOR) – 35 points
  - Undertaken between one (1) and two (2) similar assignments (i.e. gender based research, evaluation and action as outlined in TOR) – 25 points
- Experience engaging different target groups (Government agencies/organisations, NGOs, Community Based Organisations, rural communities, persons with varying levels of literacy at the local and regional (or) international levels. (20 points)
  - Experience outlined engages all listed groups at the local and regional/international levels. (20 points)
  - Experience outlined engages a half of the listed groups at the local level –(15 points)
  - Experience outlined engages 1-2 of the listed groups at the local level – (10 points)