



**JAMAICA SOCIAL INVESTMENT FUND**  
*"Investing for Community Development"*



**TERMS OF REFERENCE**

**PETROCARIBE DEVELOPMENT FUND (PDF)**

**CONSULTANCY**

**FINAL EVALUATION OF THE PETROCARIBE/JSIF SCHOOLS SANITATION –  
PROJECT and WATER SANITATION AND HYGIENE (WASH) TRAINING**

**1.0 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 of 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 and 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.

- 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.

## **2.0 BACKGROUND TO PETRO CARIBE DEVELOPMENT FUND**

Against the backdrop of the achievement of the Millennium Development Goals, particularly the realization of targets relating to halting and reversing the incidence of malaria and tuberculosis, access to reproductive health, and provision of safe drinking water and basic sanitation, jointly in 2009, the Ministry of Health (MOH) and the Ministry of Education, Youth and Information (MOEYI) sought assistance from the Petro Caribe Development Fund (PDF) to advance the improvement of sanitation systems in primary and all-age schools throughout rural communities in Jamaica. The MOEYI reported that there existed in 2009, 235 government schools island-wide that were still using unhygienic and unsafe pit latrines. To rectify this situation, a Memorandum of Understanding (MOU) was signed on May 1, 2012, which authorized the JSIF to execute small grants and special projects on behalf of the PDF. The PDF project components consist of:

- a. ***Sanitation*** – Provision of bathroom facilities to both individual households and schools that do not currently have any infrastructure or the existing unit is severely dilapidated.
- b. ***Supportive Services*** – This assistance specifically engages the beneficiaries of the sanitation units in five communities to train on group dynamics considering the density of the communities and proper sanitation and hygiene.
- c. ***Small Grants/Special Projects*** – These are grant funds provided by the PDF to directly assist grass roots organizations in building organizational capacity and where applicable providing direct assistance to participants.

For the purposes of this assignment, this consultancy will focus on the School Sanitation Project funded under the following grants.

- In 2013, JSIF was awarded a grant in the amount of **J\$52, 422,750.21** to support phase 1 of the School Sanitation Project.
- In April 2014, a grant award of **J\$35, 000,000.00** was approved to support the PDF/JSIF Schools Sanitation Project 2
- In July 2014, **J\$125,000,000.00** was approved for the construction of 8-seater bathroom blocks in 17 primary/all-age schools across the island (costing approximately 7 million each) under Phase 3.
- In 2018, **J\$145,000,000.00** was approved and this funded the fourth (4<sup>th</sup>) and final phase of the PDF/JSIF School Sanitation Project.

The project was geared to eliminate the use of pit latrines in rural MOEYI schools. As at December 2018, JSIF has utilized funding from the PDF to complete the construction of 65 sanitation blocks in primary & all age schools from the list of 235, throughout Jamaica. The number of water closets provided depended on the available space and the ratio of the number students to the number of water closets but usually the blocks consisted of five or eight water closets. Food for the Poor and CHASE Fund, together, have completed another one hundred and four (104) blocks.

The scope of the infrastructure works involved the construction of 5–seater and 8–seater flush toilet sanitation blocks built based on the specifications provided by the MOEYI. Pit latrines were replaced as a way of modernizing the facilities and providing a safer environment for the staff and students of the schools. In addition to the infrastructure, a social marketing campaign known as the Water, Sanitation and Hygiene (WASH) Programme was rolled out in the schools (students, teachers, parents and ancillary staff were engaged). These focused on developing proper hygiene practices, providing information about standard sanitary practices as well as ensuring sustainability of the units built. In addition, a maintenance training programme to ensure the newly constructed facilities are sustainable was also part of the project. Over 6000 students benefitted from the Project under Grant 3 (*See Final Project Report Grant Agreement #3, 2016*).

With regard to the Water Sanitation and Hygiene (WASH) component, training was primarily geared towards ensuring that when schools received sanitation facilities the beneficiaries were equipped with the knowledge to use and maintain them. Some schools experience the challenge of having little or no water supply and as a result water is usually harvested from rainfall or obtained from rivers/streams. The training is beneficial in preventing outbreaks of diseases based on the practices of parents, teachers and cooks. Over time, schools which have been using pit latrines for sanitation which have led to several unhygienic practices which pose health risks to children at the basic and primary school levels. In addition, with little or no safe water supply, the children would leave the bathrooms without washing their hands, thus posing a risk of diarrhoeal diseases.

The maintenance of the facilities posed another issue, as the children were unfamiliar with the use of flush toilets (at school or at home) and required some demonstration or guidance regarding its' use. The use and conservation of water is of equal importance as the children tended to play with water and leave taps running for long periods. Teachers, parents and staff/cooks were also engaged regarding the proper treatment and storage of water since the schools stored water for drinking and cooking purposes; which can cause ill-health if not done correctly. The WASH Training therefore complements the installation of the sanitation blocks and assisted in improving the approach of the beneficiaries to sanitation and hygiene. .

The table below outlines the names and parishes of the schools in which sanitation units were completed or in is the process of being constructed:

**Table 1: PDF /JSIF Schools Sanitation Project – Phases 1 & 2<sup>1</sup>**

<b>School</b>	<b>Parish</b>
1. Kilsyth Primary	Clarendon
2. Milk River Primary	Clarendon
3. Johns Hall Age	Clarendon
4. Scotts Pass Primary and Infant	Clarendon
5. Mount Liberty All Age	Clarendon
6. Victoria Primary	Clarendon
7. Friendship All Age	Hanover
8. Pell River Primary	Hanover
9. Green Island Primary	Hanover
10. Riverside All Age	Hanover
11. Cocoon Castle Primary	Hanover
12. Chambers Pen All Age	Hanover
13. Askenish All Age	Hanover
14. Orange Bay Primary	Portland
15. Lime Hall Primary	St. Ann
16. Village Primary	St. Ann
17. Chester Primary	St. Ann
18. Clapham Primary	St. Ann
19. Hartlands All Age	St. Catherine
20. St. Faiths Primary	St. Catherine
21. Cedar Valley All Age	St. Catherine
22. Bethesda All Age	St. Catherine
23. Bermaddy Primary	St. Catherine
24. Roses Valley Primary	St. Elizabeth
25. Leeds Primary	St. Elizabeth
26. Clapham All Age	St. Elizabeth
27. Slipe Leased Primary	St. Elizabeth
28. Adelphi Primary	St. James
29. Catadupa Primary	St. James
30. Lethe All Age	St. James
31. Mt. Horeb All Age	St. James
32. Brainard Primary	St. Mary
33. Carron Hall Primary	St. Mary
34. Arcadia Primary	St. Thomas
35. Easington Primary	St. Thomas
36. Brampton Primary	Trelawny
37. Broughton Primary	Westmoreland
38. Cornwall Mt. All Age	Westmoreland
39. Endfield Primary & JH	Westmoreland
40. Chantilly Primary	Westmoreland
41. New Works Primary	Westmoreland
42. Caledonia Primary and Infant	Westmoreland

<sup>1</sup> Grant in the amount of **J \$35, 000,000.00** for the construction of eight (8) seater bathroom blocks in five (5) primary/all-age schools in rural communities as Phase 2 of the PDF/JSIF Schools Sanitation Project. Pit Latrines were be replaced as a way of modernizing the facilities and providing a safer environment for the staff and students of the schools.

**Table 2: PDF/JSIF Schools Sanitation Project – Phase 3<sup>2</sup>**

School	Parish
1. Sunbury Primary	Clarendon
2. Staceyville Primary	Clarendon
3. Red Hills All Age	Clarendon
4. Rock All Age	Clarendon
5. Morgan's Forest Primary	Clarendon
6. Smithville Primary	Clarendon
7. Church Hill Primary	Hanover
8. Snowdon Primary	Manchester
9. Eccelston Primary	St. Catherine
10. St Mary's All Age	St. Catherine
11. Cassava River Primary	St. Catherine
12. Fort George Primary & Infant	St. Ann
13. Muirhouse Primary & Jr. High	St. Ann
14. St. Ann's Bay Primary	St. Ann
15. Epworth Primary	St. Ann
16. Carisbrook Primary	St. Elizabeth
17. Giddy Hall All Age School	St. Elizabeth
18. Bull Savannah Prim & Infant	St. Elizabeth
19. Lewisburgh Primary	St. Mary
20. Kew Park Primary	Westmoreland
21. Friendship Primary	Westmoreland
22. Salem Primary & Junior high	Westmoreland
23. Mount Hermon Primary	Westmoreland

**Table 3: PDF /JSIF Schools Sanitation Project – Phase 4<sup>3</sup>**

School	Parish
1. Anderson Town Primary	Clarendon
2. Success Primary & Junior High	Hanover

<sup>2</sup> A grant award was approved in the amount of one Hundred and Twenty Five Million Jamaican dollars (J\$125,000,000.00) for the construction of eight-seater bathroom blocks in seventeen (17) primary/all-age schools in rural communities for Phase 3 of the PDF/JSIF Schools Sanitation Project.

<sup>3</sup> The total cost of the Project eligible for financing by the Fund is One Hundred and Forty Five Million Jamaican dollars (J\$145, 000,000.00).The scope of the civil works involves the construction of ten (10) flush toilet sanitation blocks: comprised of four (4) 5-seater and 8-seater flush toilet blocks.

School	Parish
3. Esher Primary	Hanover
4. St. Jago All Age	Manchester
5. Essex Hall Primary	St. Andrew
6. Top Jackson Primary	St. Catherine
7. Fyffes Pen Primary	St. Elizabeth
8. Top Hill Primary	St. Elizabeth
9. Richmond Primary	St. Mary
10. Dundee Primary	Westmoreland

## 2.0 OBJECTIVES OF THE CONSULTANCY

Based on the Project’s Monitoring and Evaluation Framework, JSIF is required to conduct an Impact Evaluation of the PDF/JSIF School Sanitation Project which has entered its final phase of implementation with a closing date of June 1, 2020. The main objective of this consultancy is to conduct an ex-post evaluation of the PDF/JSIF Schools Sanitation Project for phases 1, 2, 3 and 4. This will include an assessment of the success and sustainability of all phases of the project as well as to quantify and qualify the effect of the removal of pit latrines and replacing these with block and steel hygienic lavatory facilities.

Specifically, the consultancy will seek to:

1. Assess the scope of the overall project impact from the implementation of the different phases of the project addressing but not limited to the following areas:
  - a. Relevance of project interventions to schools’ needs and alignment with national and sector priorities (Vision 2030 Jamaica–National Development Plan, Agenda 2030 for Sustainable Development, MOEYI strategic plans)
  - b. Project effectiveness relative to objectives and targets
  - c. Examine the efficiency of the project to include an evaluation of the extent to which project implementation was in accordance with project constraints with regard to timelines, design conforming to respective standards, approvals and regulations, disbursement and procurement targets, and the associated impacts on project implementation
  - d. Determine stakeholder/beneficiary satisfaction with the PDF/JSIF School Sanitation Project – that is, to document the schools’ satisfaction with the actual units and the implementation process to obtain them.
  - e. Undertake a comparison of implementation methodologies used by CHASE and Food for the Poor to undertake the construction and any complementary training that may have been facilitated. Compare the approaches used by JSIF, CHASE and Food for the Poor.
  - f. Determine lessons learned, implementation gaps, sustainability of project outputs and outcomes, recommendations of best practices.

- g. Assess the overall impact of the project, determine the return on investment for the sanitation units constructed and propose recommendations to facilitate the maintenance of the units, and

### 3.0 METHODOLOGY

This evaluation requires both the utilization of existing methodologies (to provide a means of comparison with other JSIF standards) and the development of original methodologies for specific sections of the scope of work (outlined below).

The consultancy will generate a representative sample from all 75 schools for the administration of a beneficiary satisfaction survey as well as to assess current Knowledge Attitude and Practices (KAP) as it relates to the practices in the schools and homes regarding use of sanitation facilities, water storage/treatment and usage in the schools and homes and incidents of ill-health related to these issues.

MOEYI personnel to be engaged should include Regional Managers and Education Officers affiliated with the beneficiary schools and key personnel at the MOEYI with overall responsibility for the pit latrine removal project. For the schools, staff (teaching as well as ancillary), students and parents should be engaged. The personnel to be engaged from CHASE and Food for the Poor should have had oversight for the project implementation and any evaluation of the project results from the activities undertaken.

Data gathering techniques may include face-to-face or telephone interviews and/or, on-line surveys of selected key stakeholders involved, including interviews of programme staff and the collection of administrative data and records. The consultant is responsible for developing the data collection instruments and documents, pre-testing the instruments, and conducting any training necessary to carry out the data collection activities, including administering the

instruments. (A draft of the satisfaction survey instrument is to be reviewed by JSIF prior to pre-testing). Site Visits are also to be included in the methodology. The findings from the site visits are expected to provide additional data for the final report.

### **3.1 Ethical Considerations**

- **Informed consent** should be obtained from participants and parental consent where applicable.
- **Confidentiality:** Participant's privacy and confidentiality must be protected throughout the process of the beneficiary satisfaction survey. Only trained interviewers must undertake the research with interviews being conducted privately. Data storage and reporting must also take into account the protection of the privacy and confidentiality of participants.
- **Anonymity:** Participants should be made aware of the fact that their names will not be recorded and that they cannot be identified as a result of the responses provided during data collection.

## **4.0 SCOPE OF WORKS**

The consultancy firm will undertake a participatory Final Impact Evaluation in fulfillment of the above stated objectives. Specifically, the consultant firm shall undertake the following:

1. A review of project documents for Phase 1, 2, 3 and 4 of the PDF/ JSIF Schools Sanitation Project (Grant Agreements, Field Visit Reports, Consultancy Reports – Post Evaluation of the Petro Caribe Sanitation – Phase II, Water & Sanitation Hygiene Baseline Research Report, among others). In addition, a review of the necessary sector specific policies, programmes, projects and strategies will also be required.
2. Conduct consultations with the JSIF Team aimed at the formulation of recommended questions to guide discussions with the beneficiary entities that will best stimulate responses concerning the achievements and challenges of the project.
3. Interview the relevant JSIF project staff to establish the history of any modifications to the original project designs and reasons for the changes
4. Prepare Inception Report outlining the relevant quantitative, qualitative or mixed methods approaches to be undertaken to assess the intended and unintended outcomes of the project with regard to the identification of lessons learned, implementation constraints, success factors, and appropriateness of project design, relevance of interventions, partnerships, achievements, beneficiary satisfaction, cost-effectiveness and sustainability.



- a. The Inception Report should address all matters arising from the TOR and operational matters that will affect the execution of the project, including staffing and timelines.
5. Conduct Beneficiary Satisfaction Survey and assessment of current Knowledge Attitude and Practices (KAP) of school beneficiaries based on WASH Training as it relates to the practices in the schools and homes regarding use of sanitation facilities, water storage / treatment and usage in the schools and homes and incidents of ill-health related to these issues.
6. The Consultant is expected to identify and utilize existing sources of information such as records of the school nurses and other records, (employing participatory quantitative and qualitative approaches) with key stakeholders that are involved in key project activities to determine stakeholder satisfaction levels. These stakeholders should include but are not limited to:
  - a. MOEYI Education Officers
  - b. Ministry of Health Public Health Officers
  - c. Social Development Commission Community Development Officers
  - d. JSIF Project Manager – PDF Sanitation Project
  - e. JSIF project staff and/or any external consultants who implemented WASH programme
  - f. Schools Administrators (principals, teachers, ancillary staff)
  - g. Students
  - h. Parents
  - i. CHASE and Food for the Poor project managers

From these meetings, the implementation history and actual outcomes of the project from the stakeholder's perspectives are to be established and the sustainability of activities implemented is to be documented.

7. Examine the impacts and sustainability of the project interventions, activities and results and provide recommendations for possible follow up or future operations taking into account evaluation criteria such as relevance, effectiveness to date, efficiency to date, development impact and sustainability, and beneficiary satisfaction.
8. Conduct field visits to assess the structural soundness of the sanitation facilities provided. Using relevant national and international instruments and standards assessments of the sanitation infrastructure in the schools must be conducted to confirm the following:
  - a. Whether proposed designs were fit for intended purpose.
  - b. Confirm that MOEYI specifications were adhered to
  - c. Check that National and JSIF's environmental guidelines were followed

- d. The sustainability of the interventions should be evaluated against MOEYI criteria and international standards.

Findings from the infrastructural analysis should be documented clearly outlining what has been achieved, best practices implemented, any gaps that exist and recommendations to address any issues that may impact sustainability of the facilities. Any current or planned maintenance policy /programme the beneficiaries have should also be documented.

9. Assess the overall project impact from the implementation of the different phases of the project addressing but not limited to the following areas:
  - a. Relevance of project interventions to schools' needs and alignment with national and sector priorities ((Vision 2030 Jamaica–National Development Plan, Agenda 2030 for Sustainable Development, MOEYI strategic plans)
  - b. Project effectiveness relative to objectives and targets
  - c. Examine the efficiency of the project to include an evaluation of the extent to which project implementation was in accordance with project constraints with regard to timelines, design conforming to respective standards, approvals and regulations, disbursement and procurement targets, and the associated impacts on project implementation
  - d. Determine stakeholder/beneficiary satisfaction with the PDF/JSIF School Sanitation Project– that is to document the schools' satisfaction with the actual units and the implementation process to obtain them.
  - e. Determine stakeholder/beneficiary satisfaction with the PDF/JSIF School Sanitation Project by documenting the MOEYIs' satisfaction with the units provided and the implementation process to obtain them. Confirm if the units and complementary WASH and Maintenance training met the Ministry's objectives.
  - f. Determine lessons learned, implementation gaps, sustainability of project outputs and outcomes, recommendations of best practices.
  - g. Assess the overall impact of the project, determine the return on investment for the sanitation units constructed and identify recommendations to facilitate the maintenance of the units,
  - h. The final evaluation should integrate the findings of the Beneficiary Satisfaction Survey conducted within beneficiary schools and the feedback from the MOEYI.
10. Assess the implementation and monitoring and evaluation methodologies used by CHASE and Food for the Poor to construct the units provided by those entities. Do a comparison of the strategies used by those organizations and JSIF and report on which approach was the most cost efficient and effective in meeting the objectives.

11. Comprehensively document research findings via audio recordings, reports and PowerPoint documents. A registration system to track participants' (date, age groups, gender, disability status, occupation/job title, organization, schools/zone, geographical regions) must also be created for the primary data which is collected.
12. Based on (1) to (9) above, prepare and submit deliverables to JSIF:
  - a. Present findings in a formal presentation to key stakeholders and incorporate feedback into final report
  - b. Conduct de-briefing meetings, as required
  - c. Copies of the original and cleaned data sets, including any field notes, TOR, as well as annexes of processed results tables (with all levels of disaggregation, including geographical area breakdown) are to be submitted to JSIF with final report.

## 5.0 DELIVERABLES

**5.1** Convene a **Briefing Meeting** with JSIF Team within 10 calendar days after the contract is signed. The objective of this meeting is to review the TOR and establish a common understanding about the contract's objective. Among the topics for this meeting will be the JSIF's goals and expectations for the work, a preliminary discussion of the proposed methodology, review of project schedule, and administrative details related to reports and ongoing communication.

**5.2** An **Inception Report** is to be submitted within 15 calendar days after the contract is signed. It must include a comprehensive research methodology, data analysis plan, data collection templates/instruments and a detailed work plan with implementation timelines. The Data Analysis Plan shall delineate the conceptual and methodological framework for the entire evaluation and shall outline the steps to be taken in order to respond the scope of works documented in Section 4. As appropriate, the deliverable shall expand upon or refine the research questions and topics outlined in the Terms of Reference, and additional questions/topics which may be defined by the JSIF or the consultancy team during the course of the work. The Data Analysis Plan shall specify the methods by which data collection will occur, and from whom, including a timetable for any development, pre-testing and revision of data collection instruments. Both quantitative and qualitative research and analysis is to be undertaken for this assignment. The Data Analysis Plan shall include a description of the data and its sources required to complete the analyses.

**5.3** **Beneficiary Satisfaction Survey Instrument** within 20 calendar days after contract is signed. The consultancy will generate a representative sample from the 75 schools and administer a beneficiary satisfaction survey as well as assess current Knowledge Attitude and Practices (KAP) as it relates to the practices in the schools and homes regarding use of sanitation

facilities, water storage/treatment and usage in the schools and homes, and incidents of ill-health related to these issues.

**5.4 An Interim Report and PowerPoint presentation** of the findings, triangulated analysis (infrastructural/social development analyses), and recommendations should be submitted within 90 calendar days after contract is signed. The findings must indicate the outputs and outcomes of the implementation of the PDF/JSIF Schools Sanitation Project; identify constraints, lessons learned and recommendations. Additionally, focus must be directed at identifying: success factors, appropriateness of design, relevance of intended results, partnerships, achievement and relevance of results, cost-effectiveness and sustainability. The report should also integrate the following:

- *Infrastructural Analysis:* The Infrastructure Analysis should review project documents, examine relevant secondary data sources and conduct interviews with stakeholders. The analysis will document original designs of the sanitation units and any changes made to the initial designs. Reasons for any changes to the design should be included in the analysis. The status of units completed and a determination of the value of the investment– with regard to cost-effectiveness of implementation. Sustainability should also consider the infrastructure’s effectiveness to withstand adverse climate changes and operational resilience over time. The infrastructural analysis should also address whether the design conformed to respective building standards and regulations as it relates to the quality of the infrastructure provided by JSIF.
- *Social Development Analysis:* The Social Development Analysis should review project documents, examine relevant secondary data sources and conduct surveys, focus groups, and elite interviews with beneficiaries in targetted schools, staff, and students as well as programme staff at JSIF. The Social Development Analysis should integrate the findings of :
  - Infrastructure Analysis and WASH programme evaluation, to assess the extent to which the PDF/JSIF Schools Sanitation Project achieved the stated developmental objectives/outcomes, including gender, access and inclusion considerations.
  - Assessment of the Implementation Methodologies used by CHASE and Food for the Poor: report on the findings from the meetings held and the comparisons made between the approaches used by those organizations and JSIF’s approach as it relates to efficiency, cost effectiveness and achievement of the Project objective.
  - Feedback from MOEYI concerning the effectiveness of the approach used by all organizations in implementing the Project and if the anticipated objective was met should be included in the report.
- *Findings of the Beneficiary Satisfaction Survey* must be integrated in the Interim and Final Reports.

The PowerPoint presentation for the interim report is to be made at meeting of all the relevant project and government stakeholders.

**5.5 A Final Report** of findings, triangulated qualitative and quantitative analyses, recommendations and participant profiles within 120 calendar days after the contract is signed. The findings must indicate the impact of the implementation of the PDF/JSIF Schools Sanitation Project; identify constraints and lessons learned and recommendations. Additionally, focus must be directed at identifying: success factors, appropriateness of design, relevance of intended results, partnerships, achievement and relevance of results, cost-effectiveness and sustainability. Comments from the interim report and presentation must be taken into consideration when writing the final report. The report must consist of: (a) a synthesized analysis of findings from all schools. A copy of the TOR for the consultancy and data collection instruments must be included in an annex of the report. **PowerPoint presentation integrating the feedback from the stakeholder meeting is submitted with the Final Report**

**Note: The Work Presentation for deliverables 5.2 to 5.5 is incomplete without submission of the following:**

- a. Three (3) hard copies and one electronic copy in Microsoft Word (on CD/Jumpdrive) of reports.
- b. Three (3) hard copies and one electronic copy (on CD/Jumpdrive) of PowerPoint documents.
- c. One copy of audio recordings or transcripts in Microsoft Word of primary research data collected are to be submitted with relevant reports (on CD/Jumpdrive). If any focus groups are held, audio recordings must include the location, date, name of the facilitator and participants/groups. If any names are mentioned pseudonyms are to be used to protect confidentiality
- d. Primary data sets through quantitative SPSS software and (NVivo) software must also be submitted.

## **6.0 DURATION OF CONTRACT**

The intended commencement date is April 2019. The overall consultancy should be conducted over a period of not more than 5 months inclusive of JSIF's feedback timelines.

## **7.0 PROCUREMENT SELECTION METHOD**

The assignment is for a firm/team and the procurement selection method will be Consultants' Qualification Selection Method (CQS).

## **8.0 PAYMENT SCHEDULE**

15% of contract sum upon submission and approval of Inception Report – Deliverable 5.2. In the report, the consultancy firm shall provide a detailed work plan with implementation timelines, a comprehensive outline of quantitative and qualitative research methodologies including geographical breakdown of schools, the research design and dates for the submission of the requisite reports, research questions, and software for analyses (SPSS, NVivo etc.) (to be a maximum of 25 pages excluding annexes). JSIF shall subsequently have ten (10) calendar days within which to forward comments to the Consultancy Firm.

30% of contract sum upon submission and approval of the Beneficiary Satisfaction Survey Instrument – Deliverable 5.3. This document shall be submitted no later than twenty (20) calendar days from the commencement of the contract. JSIF shall subsequently have ten (10) calendar days within which to forward comments to the Consultancy Firm.

25% of contract sum upon submission and approval of the Interim Report (to be a maximum of 80 pages excluding annexes) and PowerPoint document **and** presentation of findings of Deliverable 5.4 to relevant stakeholders. The PowerPoint document should consist of a maximum of 40 slides. This PowerPoint and Interim Report document shall be submitted no later than 90 calendar days from the commencement of the contract. JSIF shall subsequently have fifteen (15) calendar days within which to forward comments to the Consultancy Firm. The PowerPoint presentation of findings to the JSIF team and relevant stakeholders is expected to take place within fifteen (15) calendar days of the Consultancy Firm's submission.

30% of contract sum upon submission and approval of the Final Report and the revised PowerPoint Presentation of Deliverable 5.5. The final report should consist of a maximum of 100 pages (main text, excluding annexes) of findings in Microsoft Word. This report shall be submitted no later than 120 calendar days from the commencement of the contract. JSIF shall subsequently have fifteen (15) calendar days within which to forward comments to the Consultant. The PowerPoint document should consist of a maximum of 40 slides.

**Note:** Payments are contingent on JSIF's approval of the satisfactory completion of deliverables in keeping with the guidelines for 'Work Presentation' in section 5.

## 9.0 REPORTING ARRANGEMENTS

Prior to the start of this assignment, there will be an initial briefing with the PDF Project Manager and the M&E Unit. The consultant shall report all technical and contractual matters to the PDF Project Manager.

All day to day reporting will be overseen by the M&E Analyst with general supervision by the Project Manager–Social Development/M&E. The consultancy firm is reminded that he/she should request problem-solving meetings with the PDF Project Manager and the Project Manager –Social Development /M&E as soon as there is any indication of a variation in the scope of work, changes to the timeline or additional costs being necessary. No variations are to be made to the agreed scope of works, time or cost without the written approval of the JSIF by letter or email.

**Note: Consultants may not publish a report based on this evaluation or otherwise disclose the contents of reports prepared under this contract unless written approval is received from the JSIF.**

## 10.0 QUALIFICATIONS

A multi-disciplinary team will be required to undertake the assignment. The Consultancy firm's team should possess at the minimum the following qualifications

a) The **Lead Researcher/Consultant** should possess:

- An Advanced Degree in a related Social Science Discipline such as Community Development, Public Health, Development Studies, Social Policy, Psychology, Behaviour Change and Sociology or Social Work
- At least five (5) or more years' experience working on similar assignments requiring:
  - Inter-agency partnerships at the community/organizational level
  - Use of triangulated qualitative and quantitative research methodologies
  - Report preparation for Government Agencies or International organizations.
  - Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.
  - Proficiency in Microsoft Word, Excel, and Access.
  - Programme/Project development, monitoring and evaluation
  - PLA and other participatory research methodologies
  - Partnership with government, international agencies and non-government sectors in rural areas

b) **Team members/Consultants** should possess:

- The **Social Specialist** should possess:

- A minimum of a First Degree in related Social Science Discipline such as Community Development, Public Health, Development Studies, Social Policy, Psychology, Behaviour Change, Social Work or Sociology.
  - Knowledge and at least three (3) to five (5) years' experience with the following:
    - PLA and other participatory research methodologies
    - Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.
    - Inter-agency partnerships at the community level
    - Use of triangulated qualitative and quantitative research methodologies
    - Public health, water, sanitation and hygiene and similar projects
    - Proficiency in Microsoft Word, Excel, and Access
    - Programme/Project development, monitoring and evaluation
    - Knowledge of gender, access and inclusion issues and best practices
    - Experience working in rural areas
- c) The **Infrastructure consultant** should possess at the **minimum** the following qualifications:
- Bachelor's Degree in Civil Engineering
  - At least three (3) to five (5) years' experience designing and implementing major public sector integrated development projects (water, sewage / sanitation, roads, public buildings)
  - Show evidence of experience working on infrastructure projects that incorporate international and/or national environmental standards in the design
  - Knowledge of Jamaica's environmental guidelines and ISO 14001 standards as it relates to construction of building, road works, sewerage works and implementation of water lines in residential and rural areas would be an asset
  - Knowledge of Jamaica's and the International (IBC) building code requirements and familiarity with the National Accessibility Standards for Persons with Disabilities would be asset
  - Experience conducting infrastructure works in both rural and urban areas.

## 11.0 GUIDING PRINCIPLES AND VALUES

The evaluation team will be required to adhere to, and be guided by, professional and ethical standards while contracted to the JSIF.



## 12.0 EVALUATION CRITERIA

### Evaluation Rubric

Criteria	Score/100
<b>Lead Consultant General Qualifications</b>	<b>20</b>
A PhD in related Social Science Discipline such as Community Development, Development Studies, Social Policy, Psychology, Behaviour Change Modification and Sociology or Social Work	20
Masters level qualification - Social Science Discipline such as Community Development, Development Studies, Social Policy, Psychology, Behaviour Change Modification and Sociology or Social Work	15
<b>Lead Consultant General Experience</b>	<b>20</b>
Possesses six (6) years' or more experience working on similar assignments requiring: <ul style="list-style-type: none"> <li>Inter-agency partnerships the global/national/community levels</li> <li>Use of triangulated qualitative and quantitative research methodologies</li> <li>Report preparation for Government Agencies or International organizations.</li> <li>Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.</li> <li>Proficiency in Microsoft Word, Excel, and Access.</li> </ul>	20
Possesses at least five (5) years' experience working on similar assignments requiring: <ul style="list-style-type: none"> <li>Inter-agency partnerships at the global/national/community levels</li> <li>Use of triangulated qualitative and quantitative research methodologies</li> <li>Report preparation for Government Agencies or International organizations.</li> <li>Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.</li> <li>Proficiency in Microsoft Word, Excel, and Access.</li> </ul>	15
<b>Organization and staffing</b>	<b>20</b>
The consultancy firm should be able to field a team which MUST include the following key experts: <ul style="list-style-type: none"> <li>Social Scientist (Bachelor's Degree)</li> <li>Civil Engineer (Bachelor's Degree)</li> </ul>	20
<b>Team Members' General Experience</b>	<b>20 overall</b>
Senior Civil Engineer : <ul style="list-style-type: none"> <li>At least five (5) years' experience designing and implementing major public sector integrated development projects (water, sewage / sanitation, roads, public buildings) Show at least three (3) years' experience working on infrastructure projects that incorporate international and/or national environmental standards in the design</li> <li>Knowledge of Jamaica's environmental guidelines as it relates to construction of building, road works, sewerage works and implementation of water lines in residential areas.</li> <li>Knowledge of Jamaica's and the International (IBC) building code requirements and familiarity with the National Accessibility Standards for Persons with Disabilities would be asset.</li> <li>Experience working in both rural and urban areas</li> </ul>	10
Junior Civil Engineer : <ul style="list-style-type: none"> <li>At least three (3) years' experience designing and implementing major public sector integrated development projects (water, sewage / sanitation, roads, public buildings) Show at least three (3) years' experience working on infrastructure projects that</li> </ul>	5

<ul style="list-style-type: none"> <li>○ incorporate international and/or national environmental standards in the design</li> <li>○ Knowledge of Jamaica’s environmental guidelines as it relates to construction of building, road works, sewerage works and implementation of water lines in residential areas.</li> <li>○ Knowledge of Jamaica’s and the International (IBC) building code requirements and familiarity with the National Accessibility Standards for Persons with Disabilities would be asset.</li> <li>○ Experience working in both rural and urban areas</li> </ul>	
<p>Social Scientist:</p> <ul style="list-style-type: none"> <li>○ At least five (5) years’ experience working on similar assignments requiring: <ul style="list-style-type: none"> <li>○ Inter-agency partnerships at the community level</li> <li>○ Use of triangulated qualitative and quantitative research methodologies</li> <li>● Public health, water, sanitation and hygiene and similar projects.</li> <li>○ Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.</li> <li>○ Knowledge of gender, access and inclusion issues and best practices</li> <li>○ Proficiency in Microsoft Word, Excel, and Access.</li> </ul> </li> </ul>	10
<ul style="list-style-type: none"> <li>○ At least three (3) years’ experience working on similar assignments requiring: <ul style="list-style-type: none"> <li>○ Inter-agency partnerships at the community level</li> <li>○ Use of triangulated qualitative and quantitative research methodologies</li> <li>● Public health, water, sanitation and hygiene and similar projects.</li> <li>○ Statistical Package for Social Sciences (SPSS) and the qualitative software NVivo.</li> <li>○ Knowledge of gender, access and inclusion issues and best practices</li> <li>○ Proficiency in Microsoft Word, Excel, and Access.</li> </ul> </li> </ul>	5
<b>Experience in Region</b>	<b>10</b>
A minimum of six (6) years’ experience undertaking similar projects in developing countries, particularly in the Caribbean region.	10
A minimum of five (5) years’ experience undertaking similar projects in developing countries, particularly in the Caribbean region.	5
<b>Evidence of evaluation reports developed</b>	<b>10</b>
8 or more reports	10
3-7 reports	5