

## TERMS OF REFERENCE

### Finance and Cost Plan

### CARICOM Human Resource Development 2030 Strategy

**Division:** Economic, Youth and Sustainable Development Directorate

**Project ID:** YHCWG1062: Learning for Life

**Title:** Development of Finance and Cost Plan for the CARICOM Human Resource Development 2030 Strategy

**Start Date:** May 2019

**Project Location:** Home based; Georgetown, Guyana

**Consultancy Fees:** £9,800

**Total cost of assignment (approx.):** £12,335

#### 1. Background

The Commonwealth Secretariat is a voluntary association of 53 independent sovereign states, which cooperate in the common interests of their citizens, to further international understanding, development and democracy. The Commonwealth's membership has great diversity of economic strength, geography and ethnicity, combined with a common heritage of values, language, institutions and democratic traditions. The Commonwealth Secretariat is the principal intergovernmental body of the Commonwealth, responsible for progressing and achieving the shared goals of the association's member governments in advancing democracy, development and respect for diversity.

The Caribbean Community (CARICOM) is an organisation of fifteen Caribbean States and five British dependencies whose main objectives is to promote economic integration and cooperation among its members, to ensure that the benefits of integration are equitably shared, and to coordinate foreign policy. The organisation was established in 1973. Thirteen of the CARICOM Member States are also members of the Commonwealth of nations.

The Commonwealth Secretariat and the CARICOM Secretariat signed an agreement to strengthen cooperation between the two organisations, on 3<sup>rd</sup> May 2018. The agreement was drawn against the framework of a Memorandum of Understanding that was signed in 1996. The agreement aims to facilitate joint implementation of programmes or projects while harnessing the experience and resources of the two organisations. Areas of cooperation include Youth, Sports and Gender - promoting increased youth development through education and employment, and develop programmes to promote sports and women's rights.

The Human Resource Development (HRD) Commission of CARICOM, established by a mandate from the Thirty-Fifth Regular Meeting of the Conference of Heads of Government, 4 - 6 July 2014, Antigua and Barbuda, crafted a Human Resource Development 2030 Strategy which aimed at ensuring that the education and training sectors were relevant to the needs of twenty-first century economies and societies.

At the Thirty-Eighth Meeting of the Conference of Heads of Government, 2-4 July 2017, Grenada, the HRD 2030 Strategy was endorsed as the Regional document to guide the future development of the education sector and provide direction for the region's response to the United Nations Sustainable Development Goals (SDGs).

The Commonwealth Secretariat has been mandated to assist member countries to improve education and learning, and youth development in all States. (Commonwealth Secretariat Strategic Plan 2017/18 - 2020/21). The Commonwealth's work in this area focuses on strengthening national and international policies, including their alignment to the 2030 Agenda for Sustainable Development and the SDGs, building the capacity of national institutions and policy stakeholders.

To do this, the Commonwealth Secretariat's efforts focus towards policy advocacy and technical support for the development and implementation of strengthened education and social development policies that better undergird the SDGs, and position its members to realise the targets of these in line with their national agendas. Expertise is provided to member countries in policy analysis and strategies for bridging gaps between policy formulation and policy implementation.

The Commonwealth Secretariat delivers targeted technical assistance projects to support policy and strategy development, produces guidelines, toolkits and other technical resources for member countries, and, organises related capacity, training, events and high-level meetings. The Secretariat privileges partnerships and collaboration to deliver the objective of improving human and social development in all its member countries. In particular, the Commonwealth Secretariat supports its member states by working in synergy and collaboration with regional intergovernmental organisations, including the CARICOM Secretariat.

The Commonwealth Secretariat is therefore desirous to assist the CARICOM Community (CARICOM) in the effective implementation of the HRD 2030 Strategy (C-HRD 2030 S).

### **The HRD 2030 Strategy**

The goal of the HRD 2030 Strategy is the development of the 'whole' person, not just for purposes of attaining productive livelihoods as competent innovatively skilled workers and entrepreneurs, but to contribute to educating enlightened individuals who can support 'meaningful and informed' social and cultural changes through their daily and professional lives within their homes, communities, schools, workplaces and the global space.

The four Strategic Priorities which give direction to the Strategy, namely, **Access and Participation, Equity, Quality and Relevance**, and the resultant focus on a seamless HRD system, have been specifically targeted to address the significant inefficiencies, wastage and redundancies in education and training systems throughout CARICOM. The system comprises actors in three sectors – basic education (early childhood to secondary), skills for lifelong learning and tertiary education. This change in the system must embrace global competitiveness issues to deliver education and training.

## **2. Purpose and scope of the consultancy**

The primary purpose of the assignment is to provide technical assistance to the CARICOM Secretariat to support the implementation of C-HRD 2030 S.

The successful implementation of the C-HRD 2030 S is challenged by limited resources for policy initiation, sector transformation and professional training. As such, execution is occurring at different speeds in various sectors and across individual Member States. The CARICOM Secretariat continues to work closely with Member States and International Development Partners to identify funding, including in kind or the exchange of technical expertise, to support the implementation process at the regional level; but the success of the C-HRD 2030 S is highly dependent upon strong regional political will, collective action and a huge increase in investment in education in Member States.

The global economic downturn has significantly reduced the availability of funding from donor partners; resulting in significant social challenges around social security, and social displacement of people due to political instability, and increasing unemployment. Recovery efforts from environmental disasters have seen budgetary priorities shifting from education to other social areas. In this context, promoting access and participation, equity, quality and relevance in education will require the **mobilisation and effective use of financial resources** that are strategically utilized at the regional level and within Member States.

It is therefore proposed to identify dedicated sources of funding to support the implementation of C-HRD 2030 S. This calls for a robust forward-looking resource mobilization strategy which takes into account the changing donor landscape as well as lessons learned from current resources mobilization efforts. This Strategy must also outline a systematic and strategic finance projection of costs at the national level, to allow decision-makers to consider the extent to which policy objectives and strategic orientations are feasible and affordable in their individual country.

The process of finance and costing the C-HRD 2030 S is part of the implementation strategy, and considered as an essential part of the planning process.

The Commonwealth Secretariat therefore proposes to support the development of a finance and cost estimation plan in relation to the overarching vision and strategy of the C-HRD 2030 S and of its implementation.

To this end, the Commonwealth seeks a qualified consultant to develop a resources mobilization strategy with a proposed results-oriented action plan and cost proposal. The overall purpose of the consultancy is to establish a clear overview of current and potential funding opportunities for the implementation of the C-HRD 2030 S. In addition, the consultant will be instrumental in developing a cost projection along the guidelines provided by the CARICOM Secretariat.

The overall objective is as follows:

1. Provide CARICOM Heads of Government and the CARICOM Secretariat with financial projections for resource mobilisation, allocation and prioritization at the regional level; and,
2. Indicate to Member States the projected cost of successfully implementing the C-HRD 2030 S at the national level, and so prefigure the allocation of resources for developmental plans.

### 3. Scope of Work and Key Responsibilities

**Responsibilities of the Consultant:**

## Methodology

- Review CARICOM Human Resource Development 2030 Strategy (C-HRD 2030 S) to determine the resource and financial implications for the CARICOM Secretariat and Member States
- Identify and prepare projected costs for activities and projects to be implemented at the regional and national levels, in collaboration with staff at the CARICOM Secretariat (CCS);
- Prepare a Finance and Costing (F & C) proposal for the implementation of the C-HRD 2030 S, including an executive summary for the proposal;
- Collect and analyse data and information required to complete the project, in collaboration with key internal stakeholders<sup>1</sup> at the CCS, including to access data;
- Present the draft F & C proposal to internal CCS committee;
- Revise the draft proposal based on feedback of the internal CCS committee and submit the draft final proposal to Programme Manager, HRD CCS;
- Present the F & C to the meeting of the Council for Human and Social Development (COHSOD);
- Make any revisions required to the F&C based on feedback from the COHSOD.

## 4. Daily Time Commitments

The Consultant is expected to work for twenty-eight (28) working days

Step/Activity	Days	Due Date
Desk review	2	26 May 2019
Inception report	2	28 May 2019
Draft a finance and costing plan including executive summary	4	3 June 2019
Travel/Data collection and analysis in-country (Guyana)	3	6 June 2019
Consult with CCS in-country (Guyana)	2	12 June 2019
Complete draft finance and costing plan	3	18 June 2019
Present draft F & C plan to internal CSS	1	20 June 2019
Revise F&C plan based on feedback from CSS Committee	3	24 June 2019
Draft and submit report (descriptive and analytical) which will be submitted for endorsement and approval at COHSOD meeting	4	28 June 2019
Present the F&C to COHSOD meeting	1	October 2019
Revise the F&C plan based on feedback from the COHSOD	2	October 2019
Finalise and submit final report to CARICOM and to the Commonwealth Secretariat and CARICOM	1	October 2019

## 5. Remuneration

The consultant will be paid a total fee of **£9,800**, at a daily rate of **£350**, for the period of 28 working days.

## 6. Deliverables and Timelines

The assignment is expected to take place between 20 May 2019 - 31 October 2019.

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<sup>1</sup> Human Resource Development (HRD), Resource Mobilisation and Technical Assistance (RMTA), Strategic Management (SMU) and the Finance and Accounting (F&A) Units

The work of the Consultant will specifically include but not limited to the following deliverables:

Deliverables	Due Date	Remuneration
Upon submission of Inception Report	30 April 2019	£1000
Upon submission of Draft Finance and Costing Plan including Executive Summary	6 May 2019	£1500
Upon submission of completed draft F&C plan to internal CSS following consultation/data analysis	4 June 2019	£2500
Upon submission of revised F&C plan	11 June	£3400
Upon submission of Final F&C plan	October 2019	£1400
<b>Total</b>		<b>£9800</b>

Travel and per diem (approx.) to travel to Guyana, in-country work (5 days): £1000 + £1535= £2535

Total Cost of Assignment (approx.): **£12,335**

### Approach and Implementation Arrangements

The consultancy work will be overseen by the CCS. The assignment will be delivered through a collaborative approach; the consultant (s) will be recruited by the Commonwealth Secretariat and assigned to the CARICOM Secretariat to undertake the assignment.

The consultant will report to the Assistant Secretary General (ASG) - Human and Social Development Directorate and work in direct collaboration with the Programme Manager- Human Resource Development (HRD). The consultant will also be expected to complete the task in collaboration with the Finance Unit (FU) and the Resource Mobilisation and Technical Assistance Unit (RMTA) of the CCS (CARICOM).

The consultancy will include five (5) working days at the CARICOM Secretariat, Georgetown, Guyana. The CARICOM Secretariat will provide:

- Office space as appropriate
- Support with the identification of temporary accommodations in Georgetown, Guyana
- Support with ground transportation to and from the office

The Commonwealth Secretariat will provide a Return Air Ticket from the consultant's home country to Georgetown, Guyana and incidental travelling expenses to and from the respective airports will be provided. The most direct and economical means of air travel available will be applied (including where practical excursion or other specific fares) but in any event not more than economy class; and Daily Subsistence Allowance (DSA) over a period of five (5) days at the prevailing United Nations rate in Georgetown, GUYANA, will be provided. All travel costs will be guided by the Secretariat's Travel and Expenses Policy.

The consultant is expected to submit the F&C Proposal and plans (drafts and final) for review and approval to the Project Manager, with a copy to the Commonwealth Secretariat.

Fees will be paid by the Commonwealth Secretariat, in-line with the satisfactory completion of deliverables as outlined in Terms of Reference, upon specific written approval of the Programme Manager, HRD (CARICOM Secretariat).

The total fee quoted in proposals should include all travel and subsistence requirements and any tax payable by the consultant. The Commonwealth Secretariat will not be responsible for any tax payable by its consultants. Please note that while on assignment for the Commonwealth Secretariat consultants are insured under its emergency medical and travel insurance policy.

The Consultant will submit all reports and documents in English. Reports must be submitted electronically using the Microsoft suite applications as relevant. Documents submitted are not to be in PDF.

Contacts:

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## Qualification and Skill Requirements

*Applicants should possess:*

- A minimum of a Masters level qualification in Finance and Accounting, including professional accounting qualifications (e.g. CPA; ACCA)
- At least eight years' experience working in the area of Finance and Accounting, with a particular focus on costing and expenditure projections.
- Demonstrated capacity with supporting institutions and or entities with the development of Finance and Cost proposals for strategic plans.
- Cross cultural competency, with experience working in Commonwealth developing countries, and the Caribbean region in particular, highly desirable.

*Applicants should be able to demonstrate:*

- Proven ability to design implementable Finance and Cost plans for public authorities across social and economic policy domains.
- Proven ability to undertake consultation and analysis pertaining to F&C development.
- Proven ability to think laterally and apply innovative thought to design, and to develop practical F&C recommendations.
- Strong planning and analytical skills.
- High level written and interpersonal communication.

## Application Process

To apply interested parties should submit the following:

- Overview of proposed approach to the assignment, including:
  - Methodology for each deliverable
  - Proposed scope of each service/activity
  - Total time and personnel commitment for the assignment
- Example(s) of previous work that demonstrate capability to complete the assignment;



## The Commonwealth

- For individuals: a detailed CV outlining their educational qualifications, professional engagements, and a list of other, relevant work undertaken; and  
For organisations and institutions: a prospectus outlining their relevant experience and achievements together with the CVs of experts who would work on the assignment.