

## TERMS OF REFERENCE FOR INDIVIDUAL CONSULTANT - LONG-TERM AGREEMENT

**Title: Long Term Agreement (LTA) for Engagement of Individual Consultants in Public Finance for Children (PF4C) and Local Governance (LG) in Latin America and the Caribbean**

**Duty Station:** Home based consultancy contracts

**Duration of LTA:** 36 months

**Closing Date:** One month after publication date

### **1. BACKGROUND / RATIONALE**

UNICEF promotes the rights and welfare of all children and adolescents in everything we do. Together with our allies, we work in 190 countries and territories to transform this commitment into practical actions that benefit all children, especially focusing our efforts on reaching the most vulnerable and excluded, worldwide.

In Latin America and the Caribbean (LAC), UNICEF is present in 36 countries and territories through 24 national offices spread throughout the region and a regional office based in Panama City. Efforts are aimed at UNICEF putting the rights and well-being of the most disadvantaged children at the heart of the social, political, and economic agenda, in line with our equity focus, working across our organization and with our partners in government, civil society and the private sector to support shifts in public policy, fuel social engagement, and increase investment for children.

Public Finance for Children is a key area for the promotion of children's rights and for the overcome of children poverty in the region. Through our social policy network, composed by Social Policy Specialists and focal points based in the country offices, UNICEF works in the provision of technical assistance, quality assurance, evidence generation and policy advocacy to eradicate child poverty, expand social protection for families with children and increase the quantity and quality of public investments aimed at children.

In order to support the work of UNICEF in LAC at both Regional and Country Offices, UNICEF LACRO seeks to engage the services of regional experts in Public Finance for Children, in three different areas: (1) Data, evidence and advocacy; (2) Financial System strengthening; (3) Expanding public resources.

*For information of the work of our organization in the LAC Region, please visit our website: [UNICEF LAC Region](#)*

### **2. PURPOSE OF ASSIGNMENT**

The purpose of the current Long-Term Agreements (LTA) for individual contracts is to facilitate the contracting by UNICEF offices in LAC, both at regional and country levels, of qualified consultants at pre-agreed broad terms to assist in the implementation of recurrent Public Finance for Children activities.

### **3. PROGRAMME CATEGORIES**

The focus is on Public Finance for Children (PF4C) key service areas:

Service Area	<b>i. Data, evidence, and evidence-based advocacy</b>
1	<p><b>Public Finance- data, evidence and evidence-based advocacy</b></p> <ul style="list-style-type: none"> <li>❓ <b>PFM (Public Financial Management) data and evidence</b> generation at national and subnational level to identify public financial challenges impacting on the achievement of child rights and generate evidence to guide responses and reforms. This includes the use of any of the PFM tools, diagnostics and analyses <sup>1</sup>, such as the 14 diagnostics: <b>Public Expenditure Review</b> (which may also include Public Expenditure and Institutional Reviews (PEIRs) and Climate PEIRs), <b>Public Expenditure Tracking Surveys</b>, <b>Child-focused Public Expenditure Measurement</b>, <b>Fiscal Incidence Analysis</b>, <b>National Accounts</b>, <b>Costing</b>, <b>Cost-Effectiveness Analysis</b> and <b>Cost-Benefit Analysis</b>, <b>Fiscal Space Analysis</b>, <b>Political Economy Analysis</b> of the Budget Process, <b>Citizens' Budget</b>, and <b>Community Score Card</b>. Or, any other PFM diagnostics, PFM research, or related PFM analysis related to budget, expenditure and revenue tracking &amp; analysis, as well tracking public and private debt.</li> <li>❓ <b>Evidence based advocacy and policy dialogue</b> at global, regional, national and local level to promote better PF for children. Policy advocacy and dialogue with key financial decision makers at all levels of government, Parliament, and decision makers, raise awareness around child rights and the cases for investing in children; and support development partners to use evidence in sector reforms and budget support decisions.</li> <li>❓ <b>UNICEF specific analysis on public finance</b> to inform country programme design, including drafting analysis for situational analysis and any related reporting. Support UNICEF evidence-based advocacy and communication related to PFM and investments in children</li> </ul>
	<b>ii. Systems Strengthening</b>
2	<p><b>Public Finance- Systems Strengthening</b></p> <ul style="list-style-type: none"> <li>❓ <b>PFM reforms</b>, including performance/programme-based budgeting, Financial Management Information Systems (FMIS) strengthening, and other reforms that promote service delivery and the realization of child rights; including addressing public and private debt and debt restructuring.</li> <li>❓ <b>Capacity building</b> of government and national partners on PFM and PF4C to better influence child focused public finance processes, including partners from the key social sectors at national and sub national level who are engaged in planning and budgeting for children. Also, <b>Build parliamentarians' capacity</b> in budget approval and oversight</li> <li>❓ <b>Engaging in the budget processes</b> at national and subnational level to influence planning, allocation, revenue, budgeting and spending decisions to improve <b>adequacy, efficiency, effectiveness, transparency, accountability and equity</b> of social sector budgets, identify barriers to timely financial flows to service delivery level and strengthen spending performance through capacity building, bottleneck identification and technical support, and to better advance public expenditure for children.</li> <li>❓ <b>Aligning budget laws and policies</b> - Support the Ministry of Finance with aligning budget laws and policies with child-related priorities; and support line ministries and local governments in evidence-based budget preparation</li> <li>❓ <b>Integrated National Financing Frameworks (INFF)</b> – supporting national stakeholders in establishing and operationalizing INFFs at national and local level, as detailed in INFF building blocks <sup>2</sup> related to systems strengthening</li> <li>❓ <b>Support MoF in tracking spending</b> and implementation agencies in improving child-responsive planning, budgeting and reporting; and institutionalizing budget transparency</li> <li>❓ <b>UNICEF PFM Tailored support</b> - capacity building of UNICEF staff; and technical assistance tailored for UNICEF staff on PFM to better contribute to national PFM systems strengthening. Also, supporting UNICEF engagement in sectorial PFM strengthening, such as through Sector-Wide Approaches; operationalizing the CRC Article 4 and GC-19 in national planning and budgeting;</li> </ul>
	<b>iii. Resource Mobilization</b>
3-PF4C	<b>Resource mobilization at national and local level</b>

<sup>1</sup> This For more detail see <https://www.unicef.org/documents/public-finance-toolkit>

<sup>2</sup> <https://inff.org/>

	<ul style="list-style-type: none"> <li>❓ <b>Resource mobilization, financing strategies and leveraging resources</b><sup>3</sup>. Engaging with national and international stakeholders to promote and leverage domestic and international resource mobilization for financing of child-related services/programs and facilitate service providers' access to financing at national and local level</li> <li>❓ <b>Taxation</b>: address how to ensure progressive taxation that works for the best interest of children, and that contributed to equitable access to social services.</li> <li>❓ <b>Debt</b>: engaging with governments and private and international partners to ensure debt is used for leveraging resources for children</li> <li>❓ <b>Design and costing of child-focused service packages</b> and programs to facilitate revenue mobilization, specifically taxation and/or other revenue generation modalities, at national and local level.</li> <li>❓ <b>Sector financing</b> plans and modalities at national and local level</li> <li>❓ <b>Financing strategies</b> – including <b>Integrated National Financing Frameworks (INFF)</b>, and operationalizing the financing strategy and engaging the private sector</li> <li>❓ <b>Feasibility assessments and investment proposals</b></li> <li>❓ <b>Convene potential lenders and development partners</b> to facilitate governments' access to pre-financing of critical commodities and service providers' access to concessional or donor guarantee-backed commercial loans for expanding viable service models.</li> <li>❓ <b>Innovative and Blended finance</b>-Support and advice on suitable innovative and/or blended finance modalities</li> <li>❓ <b>Social Impact bonds</b></li> <li>❓ <b>Local government in resource mobilization</b>. Work with ministries of finance and other line ministries to strengthen resource allocations towards local governments functional assignments; the design and execution of intergovernmental fiscal transfers; strengthen local revenue collection and allocation of local revenues to child related priorities</li> </ul>
4-PF4C	<p style="text-align: center;"><b>iv. Community Engagement and Child Participation</b></p> <p><b>Public Finance- Community engagement and citizens participation</b></p> <ul style="list-style-type: none"> <li>❓ <b>Community engagement and participation in budget processes</b> : Empower citizens, including children and adolescents, communities, and civil society organizations to participate in national and local budgeting processes, including through mechanisms such as social accountability and citizens budgets.</li> <li>❓ <b>Promote public access</b> to relevant data and support dialogue around open budget initiatives.</li> <li>❓ <b>Facilitate participatory budgeting</b> especially at local level by supporting child rights institutions to scrutinize budget proposals and execution reports; and</li> <li>❓ <b>Build capacity of communities and citizens</b> in understanding and tracking how and how well public funds are spent, and work with local governments to establish feedback mechanisms.</li> </ul>

#### 4. OBJECTIVE(S)

The objective of this ToR is to specify the nature, scope of activities and essential qualifications for contractors solicited and services provided under the resulting LTAs.

The expected result from this solicitation process is to establish long term agreements with pre-qualified consultants at pre-agreed broad terms to provide a menu of services in the area of Public Finance for Children, at Regional and Country Offices in Latin America and the Caribbean region. The selection of the consultants will be completed through a validation process following a combined evaluation of the technical and financial proposals.

The support facilitated through the resultant LTAs is expected to facilitate and expedite the process by which UNICEF LACRO and UNICEF Country Offices in LAC access highly qualified policy experts to support UNICEF's provision of technical assistance, evidence generation, resource mobilization and advocacy in the field of Public

<sup>3</sup> Refer to UNICEF's guidance on resource mobilization as per the new indicator in the new strategic plan UNICEF new strategic plan and results framework: [2022-11-Update\\_of\\_the\\_IRRF-Strategic\\_Plan\\_2022-2025-EN-ODS.pdf](https://www.unicef.org/strategy/2022-11-Update_of_the_IRRF-Strategic_Plan_2022-2025-EN-ODS.pdf) (unicef.org)

Finance in the Latin American and the Caribbean region, with lasting positive impact on the most vulnerable families and children.

**It is important to note the following: LTAs are non-binding Agreements which do not constitute a commitment to acquire consultant services. They indicate that the consultants are already vetted to be contracted directly as per the indicated unit price;**

## **5. MAJOR TASKS TO BE ACCOMPLISHED**

Successful candidates will be responsible for the following tasks in the PF4C area:

1. Provision of technical assistance (as per the signed contract, based on one or more of the service areas indicated in the LTA TOR) to UNICEF teams, development partners and national or subnational governments in LAC in the design, implementation, monitoring and/or assessment of interventions.
2. Evidence generation through quantitative and/or qualitative data collection; primary and secondary data analysis; development of high-quality research papers, reports and studies; documenting of good practices and lessons learnt; production of case studies and/or policy advocacy materials.
3. Design, coordination, facilitation and/or delivery of capacity building and trainings for UNICEF staff, partners staff or local counterparts (including national and/or subnational governments and civil society organizations)
4. Design, coordination and/or facilitation of policy dialogue processes, including workshops, conferences or roundtables with regional, national or subnational partners.
5. Provision of technical expertise to identify, establish, nurture or expand regional partnerships and expert networks, including between UNICEF and partners, such as public counterparts, academic institutions, multilateral organizations, civil society and international financing institutions at regional and/or country levels.

Each assignment, as required by the regional office or country offices, will establish the specific deliverables, objectives, targets and timing required based on which successful LTA holders will submit a detailed workplan with tangible and measurable outputs. The work assignment instructions will include number of days and details as to how the work must be delivered (e.g. electronic submission, hard copy, databases, etc.), subdivided into “milestones” where appropriate; as well as indicators for evaluation of outputs (including timeliness, achievement of goals, and quality of work).

### **Responsibilities of the Consultant:**

- i. The consultant will provide technical support to country and regional offices in a timely manner, depending on their availability and according to the proposed workplan established for each assignment.
- ii. The consultant should abide to the per diem rates provided and agreed upon signature of the LTA within the UN established rates, and to the days stipulated for each delivery.
- iii. The consultant should communicate to UNICEF about any changes in its availability
- iv. The consultant will use their own equipment; laptops, microphones, software and other accessories that may be required for this task.
- v. The consultant will not share or reproduce the content/material resulting from its assignment to any third party without the written permission of UNICEF. All products will be the property of UNICEF.

## **Responsibilities of UNICEF:**

UNICEF LACRO will prepare global communications for UNICEF country offices on the outcome of this selection process, promote the signed LTAs across all levels of offices, and track the uses as well as the outcomes of the LTAs.

UNICEF will not guarantee that it will place a request for services for any amount and will not be bound by the resulting LTAs to contract any minimum number of services. As UNICEF is a decentralised organisation, the LTAs are designed to allow for field offices to raise contracts directly and locally on the basis of pre-defined Terms of Reference and associated rates. For this reason, the direct supervision of the contracts signed under the resultant LTAs is the responsibility of the hiring office, with additional technical support by LACRO, if requested.

### **7. CHILD SAFEGUARDING**

Is this project/assignment considered as "[Elevated Risk Role](#)" from a child safeguarding perspective?

YES  NO If YES, check all that apply:

**Direct contact role**  YES  NO

If yes, please indicate below the number of hours/months of direct interpersonal contact with children, or work in their immediately physical proximity, with limited supervision by a more senior member of personnel:

**Child data role**  YES  NO

If yes, please indicate below the number of hours/months of manipulating or transmitting personal identifiable information of children (name, national ID, location data, photos):

More information is available in the [Child Safeguarding SharePoint](#) and [Child Safeguarding FAQs and Updates](#)

### **8. ESTIMATED DURATION OF LTA:**

36 months

### **9. QUALIFICATIONS / SPECIALIZED KNOWLEDGE / EXPERIENCE/ LANGUAGE SKILLS REQUIRED (Please use as applicable)**

- Master's degree or PhD in economics, public finance, public policies, political sciences, developmental studies, statistics, or related field.
- A minimum of 15 years of relevant professional experience is required, preferably with direct, regional (LAC), government-related experience in public finance.
- A minimum of 5 years of professional experience in Latin America and the Caribbean is required.
- Proven experience in public finance, budget analysis, statistics or macroeconomic analysis in LAC is required
- Prior experience with socioeconomic analysis and public finance analysis is required.
- Prior experience in leading advocacy efforts to influence policy dialogue on public finance related issues is an asset

- ? Demonstrated experience in the public sector, especially in areas related to finance, planning or budget, is an asset
- ? Demonstrated excellent writing and communication skills is required
- ? Excellent analytical skills are required. Ability to carry quantitative and/or mixed-methods analysis is required.
- ? Proficiency in Spanish and/or English is required. Working knowledge of Portuguese and/or French is an asset.
- ? Proven experience with quantitative analysis, including econometric analysis, use of microdata, surveys, social registries, national census, is considered an asset.
- ? Previous experience working in the UN/UNICEF and/or the public sector in areas related to social policy and social protection are considered a strong asset.
- ? Experience in both development and humanitarian contexts is an added advantage
- ? Technical knowledge of local governance processes and/or poverty analysis are considered strong assets.
  
- ? Demonstrated capacity to communicate clearly on social policies.
- ? Demonstrated ability to work as part of a team and independently.
- ? Ability to work efficiently under tight deadlines.
- ? Must be detail-oriented and intellectually curious.
- ? Able to work effectively in a multicultural and multisectoral environment.
- ? Sets high levels of quality and productivity for self.
- ? Ability to clearly defined objectives and plan activities

Note: Candidates are free to apply to for multiple categories or all of them, based on their qualifications and professional experience. UNICEF will award LTA up to 5 top ranked candidates under each category. A candidate may be awarded LTA for one or more than one category.

#### 10. TECHNICAL EVALUATION CRITERIA (WITH WEIGHTS FOR EACH CRITERIA)

The selection of consultants for the LTA will be based on technical evaluation and financial offers in the ratio of 80:20. The criteria for technical evaluation will be as follows:

Criteria	Marks	
	Min	Max
Relevant Educational qualifications	5	10
Required professional experience and technical knowledge	10	25
Desirable professional experience and technical knowledge	10	20
Language skills	5	10
Proven writing skills (assessed through 3 writing samples)	5	15
<b>TOTAL TECHNICAL SCORE</b> The minimum overall qualifying score is 35. Only those candidates who meet the overall qualifying marks of 35 and score the minimum cut-off in each of the above sub-criteria, including the interview, will be considered technically responsive, and their financials will be opened.	35	80
<b>Financial Score</b> The selection of the consultant will be on the basis of technical evaluation & financial offer in the ratio of 80:20.		

TOTAL		100
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**12. FINANCIAL PROPOSAL:**

The Financial proposal should include the category(ies) to which the candidate is applying and the corresponded daily rate in USD, according to the template below:

Category	Daily Rate (USD)
E.g: Data, evidence and advocacy	USD xx.xx

The application to be submitted through the online portal should contain 4 separate attachments:

- i. A Cover letter explaining the motivation for applying and explaining how the qualifications and skillset of the candidate **(to be uploaded online)**
  
- ii. Curriculum Vitae (CV) **(to be uploaded online)**
  
- iii. Three Work Samples – This includes three previously written academic papers/reports/publications. **It is critical to submit work samples as you will observe from the advertisement that marks have been assigned to these criteria for arriving at the most suitable candidate**
  
- iv. A financial proposal indicating professional fee as per the above template. Please do not forget to specify your name in the file while saving. **(To be uploaded under other supporting documents).**

***Without all the above 4 documents your application will be considered incomplete and invalid and will not be considered further.***

- Any attempt to unduly influence UNICEF’s selection process will lead to automatic disqualification of the applicant.
- Joint applications of two or more individuals are not accepted.
- Please note, UNICEF does not charge any fee during any stage of the process.
- Female candidates meeting the requirements are strongly encouraged to apply.
- UNICEF is committed to diversity and inclusion and encourages qualified candidates from all backgrounds including persons living with disabilities to apply.