

# TERMS OF REFERENCE FOR INDIVIDUAL CONSULTANTS/ CONTRACTORS



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| <b>Title of contract/consultancy:</b>       | International Consultant - Public Finance/ PFM Specialist for Social Protection Floor (SPF) and Social Protection Costing/ Fiscal Space in Belize |
| <b>Type of engagement:</b>                  | <input checked="" type="checkbox"/> Consultant <input type="checkbox"/> Individual Contractor   |
| <b>Workplace of Consultancy / Location:</b> | Remote, with 2 missions to Belize, Central America (start and end of assignment, 12 days each)  |
| <b>Duration:</b>                            | 52 days over a period of 11 months  |
| <b>Start Date:</b>                          | February 2022   |
| <b>End Date:</b>                            | February 2023   |
| <b>Requesting Section:</b>                  | Programme Section – Social Policy   |
| <b>Supervisor:</b>                          | Social Policy Specialist  |

## BACKGROUND (\*)

### Background:

#### Social Protection Floors Recommendation

The Social Security (Minimum Standards) Convention No. 102 from the International Labour Organization (ILO) sets fundamental principles applying nine classical social security contingencies<sup>1</sup> into a single comprehensive and legally binding instrument. These principles have recently been recalled in the *Social Protection Floors Recommendation (SPF) 2012 (No. 202)*. The SPF is a basic set of social security guarantees that should be guaranteed to all the population, articulated around four basic guarantees (see Box Below). The SPF framework can be used to describe existing schemes in place for each of the four components of the and identify the policy and implementation gaps if any; and to plan a progressive implementation that ensures a holistic vision of the social protection system that exploits synergies and complementarities between different components. The Recommendation 202 provides practical guidance for setting national SPF and building SPFs within progressively comprehensive social security systems.

#### Social Protection Floor (SPF)

- all residents have access to affordable essential health care, including maternity care;
- all children receive basic income security providing access to nutrition, education, care and any other necessary goods and services;
- all persons in active age who are unable to earn sufficient income, in particular in cases of sickness, unemployment, maternity and disability, receive basic income security; and
- all residents in old age receive basic income security through pensions or transfers in kind.

Source: ILO

#### Assessment Based National Dialogue (ABND)

<sup>1</sup> medical care, sickness, unemployment, old age, employment injury, family responsibilities, maternity, invalidity, survivorship

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The ABND process helps to draw recommendations for the further design and implementation of social protection (SP) provisions to reach at least the SPF for all the population. The ABND is completed by a rapid costing exercise to estimate the cost of introducing these additional SP provisions. The ABND exercise includes key line government agencies, workers' and employers' representatives, civil society organizations, academicians, UN agencies, and other development partners:

- **STEP 1** – Development of the assessment matrix which contains, for each of the four guarantees of the SPF, an inventory of existing SP, poverty alleviation, employment promotion and disaster management programmes, identifies policy gaps and implementation issues, and recommendations for the design and implementation of further SP provisions, with the aim of guaranteeing, at a minimum, the SPF to all the population.
- **STEP 2** – The cost of the proposed SP provisions is then estimated and projected over the next few years. This costing exercise can serve as a basis for discussions on prioritization of different SP policy options and available fiscal space.
- **STEP 3** – The assessment report is shared with government representatives, workers and employers as well as civil society organizations and international development partners with a view to validate the recommendations and assumptions and prepare for the next steps (feasibility studies for the design of the new schemes or expansion of existing schemes, or establishment of coordination mechanisms).

## Social protection and COVID-19

The COVID-19 pandemic represents a major public health challenge with serious economic and social impacts. SP is an indispensable part of any coordinated policy response to the crisis, ensuring that people can effectively access health care while supporting job and income security for those most affected. SP increases resilience, contributes to preventing poverty, unemployment and informality, acts as a powerful economic and social stabilizer while stimulating aggregate demand in times of crises and beyond. As the countries focus on building back better after the COVID-19 crisis, establishing a universal SPF should be a central ambition. It is affordable to almost all countries and has a proven track record of rapidly alleviating poverty and reducing inequality.

## Initiatives towards establishing the a SPF in Belize

The establishment of the SPF is a priority, especially as part of national Plan Belize and Medium-term strategic goal areas, including poverty alleviation and economic recovery. In Belize, the process towards establishing a SPF started in 2017, but unfortunately stalled in 2020 with the onslaught of the pandemic. Implementing SPF could make a major contribution to more inclusive, resilient and prosperous. Different steps have been taken:

- **Comprehensive review of Social Protection Programmes (2016)**: In 2016, the Ministry of Human Development (MHDSTPA), UNICEF and UNDP conducted a “Comprehensive Review of Belize’s Social Protection System with Policy Recommendations for System Strengthening”. This report defined social protection within Belize, provided a number of recommendations including implementing a SPF, and proposed an M&E environment for both SP programs and the macro system itself, along with a Multidimensional Poverty Index (MPI), with an emphasis on multidimensional child poverty.
- **ABND (2018-19)**: Based on the recommendations of the comprehensive review, the ABND Process was initiated, including the formulation of the SPF assessment matrix, and the development of a Social Protection Expenditure Review (SPER);

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- **SPER (2019-2020):** As a vital step towards establishing a SPF, the financing arrangements for SP, looking at both incomes to the Government budget and expenditures (and returns) on SP programmes and services have been studied. It was developed under the leadership of the Ministry of Human Development, with the technical support UNICEF and ILO. The SPER complements the Comprehensive Review of 2016 by providing a quantitative analysis of the financial situation of the SP programmes in Belize. It also provides valuable information to assess their performance and identify fiscal space to implement the SPF in Belize. Furthermore, it includes key policy recommendations to strengthen the SP system in Belize. The SPER provides a detailed analysis of four main SP programmes: National Health Insurance (NHI), Social Security Board (SSB), Building Opportunities for Our Social Transformation (BOOST)/BOOST+, and Public Assistance. The report include in Annex 2 the SPF Assessment matrix for Belize.
- **SP Conferences (2019-2020):** In parallel, a series of SP National Conferences was organized, under the leadership of the Ministry of Human Development, Social Transformation and Poverty Alleviation (MHDSTPA), with the support of UNICEF, ILO and World Bank. The objective was to engage national partners in dialogue on implementable recommendations to strengthen the SP system through the development of a SPF. The series built on an integrated approach, which included labour, multidimensional poverty and SP in emergencies. Specific objectives included fostering dialogue around SP in Belize; increase knowledge on key areas of SP; generate commitments on strengthening the Belizean SP System by making it more comprehensive.
- **SPER Endorsment (2020):** Preliminary findings of the SPER were presented to the CEOs of the SP's ministries late 2020. Due to COVID-19, the finalization was put on hold and official endorsement delayed. Recently, recommendations were renewed and presented to the new administration to resume the process of implementing the key recommendations:
  - continuing the SPF;
  - Coordination of social protection programmes;
  - Social Protection Strategy with the SPF as the main building block;
  - Social Protection Strategy underpinned by a solid and legal framework;
  - Reforms based on the Social Protection Floors Recommendation, 2012.
  - Towards Universal Child Grants/Benefits
  - Progressive realization of universal child benefits;
  - Ensure that universal approaches to child and family benefits are part of a social protection system that connects to other crucial services beyond cash, and addresses life-cycle risks;
  - Integrated management system for social protection to support the progressive development of a universal social protection system.

## Way Forward:



- **High-level meeting for Endorsement of the SPER:** The SPER will be presented to a high-level/ CEO Caucus meeting level for official endorsement, along with a Cabinet Paper for the formulation

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of a national social protection Strategy, inclusive of the SPF in Belize. The cabinet paper, prepared in collaboration with the ILO, provides the overall purpose of the establishment of a SPF in Belize, the main concepts, national priorities with regards to SP, recent developments in the area of SP and main recommendations;

- **SPF scenario/ options identification, full costing and financing options:** Building upon the previous work on the SPER and the SPF Assessment matrix for Belize; and in order to complement and finalize the ABND process, the definition of the SPF, estimation of the cost, impact and affordability of implementing is required:
  - Translates the SPER recommendations into specific SP provisions that need to be introduced or further expanded in order to guarantee at least a comprehensive SPF for all the population;
  - Define the SPF options/scenarios: the definition and adjustment of scenarios, including the progressivity of implementation, will be discussed and agreed upon with stakeholders and technical working group;
  - Estimates the cost of these SP provisions and simulate the cost over a ten years period (using projections of the population, economic indicators, etc.);
  - Relates these cost projections to the projections of the government budget.

The costing of the SPF will be conducted in coordination with/ parallel with the development of the Social Protection strategy initiated by the Government. The national social protection strategy and operational plan will be developed in 2022 as part of the SDG joint programme *Building a resilient Belize through universal, adaptive, and sustainable social protection*.

## PURPOSE/SCOPE OF ACTIVITY/ASSIGNMENT (\*)

### Overview of the consultancy

The Public Finance/ Public Financial Management (PFM) Specialist is expected to lead the **SPF scenario/ options identification, full costing and financing options** in Belize, including collecting and analyzing budget data on social protection and support the identification of the cost-efficient and equitable funding schemes, in collaboration with the Government of Belize and SDG Fund Technical Working Group.

More specifically, and based on the existing work already undertaken as part of the ABND, the consultant will be expected to:

- Collect and analyse budget data related to social protection with the Ministry of Finance, Ministry of Human Development, other relevant line ministries (Education, Health) and local public authorities such as Social Security Board (SSB);
- Compile and present these data to support the identification the efficient and equitable formulas for the costing of the cost of a SPF in Belize and identification of fiscal space;
- Interact with SDG Fund Social Protection working group and stakeholders to identify the SPF options/scenarios, and adjust accordingly based on feedback.
- Lead interviews and discussions with stakeholders to define/ refine the scenarios, including the progressivity of implementation, and agree on the approach.
- The costing of the SPF will need to be developed in coordination with the development of the SP strategy.

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The consultant will be supervised by UNICEF Social Policy Specialist, and will work in collaboration with the programme coordinator of the SDG joint programme. The consultant will also work in close collaboration with the staff of the Ministry of Human Development, the Ministry of Finance, and other relevant experts in the field (SDG joint programme working group). UNICEF Social Policy Specialist will provide the necessary support to achieve the objectives of the consultancy and be aware of any issues related to consultant's performance and quality of work. All activities and deliverables undertaken will be discussed and planned in consultation with UNICEF and ILO as relevant.

Most of the work will be performed remotely. The consultant will visit Belize for 2 missions, at the onset and end of the assignment for 12 days to meet with partners and coordinate/ validate key areas of work. The consultant will work with their own ICT equipment.

| KEY EXPECTED RESULTS (*)  |  |  |                       |
|---|--|--|-----------------------|
| ACTIVITIES  | DELIVERABLES   | TIMELINE*  | BUDGET                |
| <b>Desk review:</b> will build on the existing work already undertaken (incl. SPER, SPF Matrix); identification and formulation of the required data for SPF scenario definition and budget analysis                    | <b>Inception Report</b> , including:<br>- Plan of activities<br>- literature review of available and related studies and analyses<br>- Assessment of available data and list of requested data;<br>- Proposed methodology, (costing models) and potential challenges and methodological issues | Timeline will be adjusted to link with the parallel development of the Social Protection Strategy/ Action Plan<br><br>Two months (number of days to be determined)<br><br>Including one introductory mission | 20% of contract       |
| <b>Data Collection:</b> Collect the budget data related to social protection;<br><br><b>Definition of SPF scenarios</b> in collaboration with the government and as part of the development of the national SP strategy | <b>Budget database</b> compiled and presented to UNICEF and key stakeholders<br><br><b>Definition of SPF options/scenarios</b>   | 4 months (number of days to be determined)   | 30% of contract value |
| <b>Analysis and Drafting</b><br>Including concrete recommendations  | <b>Draft report</b><br>Comprehensive analysis/ report in a word document not exceeding 50pp. excluding annexes And excel working files   | 4 months (number of days to be determined)   | 30% of contract value |
| <b>Finalization</b><br>Incorporation of comments from UNICEF and government.  | <b>Final Report and PPT presentation with key results</b>  | 2 months (number of days to be determined)<br><br>Including one mission  | 20% of contract value |

\*The timeline is indicative and will be finalized at the launch.

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## TRAVEL REQUIREMENTS\*

This assignment will not require travel outside Belize Duty Station. Most of the work will be performed remotely and the consultant will visit Belize for 2 missions, at the onset and end of the assignment for 12 days.

The consultant is responsible for arranging his/her own travel, including bearing the costs visas and travel insurance.

Accommodation, meals and incidentals costs must not exceed the UN daily subsistence allowance rates. The costs for approved travels will be reimbursed by UNICEF Belize upon submission of receipts and based on applicable UN DSA rates. All approved travels to be conducted in accordance with UNICEF travel rules and regulations.

## MINIMUM EXPERIENCE / QUALIFICATIONS (\*)

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| <p><b>Education:</b><br/> <input type="checkbox"/> Bachelors <input checked="" type="checkbox"/> <b>Masters</b> <input type="checkbox"/> PhD <input type="checkbox"/> Other</p> <p>Enter Disciplines:<br/>           An advanced University Degree in Economics, Finance, Business Administration, Public Administration/Policy (with a focus/specialization in economics, and/or finance), Economic governance, or other directly relevant fields with a solid knowledge of PFM instruments.</p> | <p><b>Knowledge/Expertise/Skills required:</b></p> <ul style="list-style-type: none"> <li>Extensive knowledge of social protection, public finance and public financial management</li> <li>Experience with working with budget financial data sets;</li> <li>Previous experience in costing exercises/ fiscal space analysis;</li> <li>Previous relevant experience with the United Nations, international cooperation agencies or government institutions is an asset;</li> <li>Work experience in Belize or the Caribbean region is an advantage;</li> </ul> |
| <p><b>Years of Experience:</b> proven experience (at least 5 years) with government social sector budget analysis, at national and/or decentralized levels; experience in child related policies is an asset</p>  | <ul style="list-style-type: none"> <li>Experience in interacting with/coordinated work between government institutions, international cooperation and civil society</li> <li>Ability to write high quality technical documents;</li> <li>Good analytical and writing skills, and the ability to present the results in a simple language, making use of visual aids (maps, graphs and other visual tools);</li> <li>Excellent spoken and written English</li> </ul>   |

## CONDITIONS OF SERVICE (\*)

Before commencing work, a consultant or individual contractor shall submit a statement of good health and take full responsibility for the accuracy of that statement, including confirmation that he or she has been informed of the inoculations required for the country or countries to which travel is authorized. Consultants and individual contractors shall assume all costs that may occur in relation to the statement of good health.

Consultants and individual contractors are required to certify that they are covered by medical/health insurance.

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## RECOURSE (\*)

UNICEF reserves the right to withhold all or a portion of payment if performance is unsatisfactory, if work/outputs is incomplete, not delivered or for failure to meet deadlines. Performance indicators against which the satisfactory conclusion of this contract will be assessed include: timeliness/quality of submission and responsiveness to UNICEF and counterpart feedback.

## PROPERTY RIGHTS

UNICEF shall hold all property rights, such as copyright, patents and registered trademarks, on matter directly related to, or derived from, the work carried out through this contract with UNICEF.

## TRAININGS

Consultants and Individual contractors, even those working from home, must complete the following online courses prior to signature of contract. All certificates should be presented as part of the contract.

- [Ethics and Integrity at UNICEF](#)
- [Prevention of Sexual Harassment & Abuse of Authority](#)
- [Sexual Exploitation Abuse \(PSEA\)](#)

Consultants and Individual Contractors must complete the following course before commencement of any travel on behalf of UNICEF.

- [BSAFE Security Training](#)

Any consultant or individual contractor who is issued a UNICEF email address must complete the following courses no later than 30 days after signature of contract.

- [UN Human Rights and Responsibilities](#)
- [UNICEF Information Security Awareness Course](#)
- [Fraud Awareness](#)

## HOW TO APPLY (\*)

Prospective consultants should apply through UNICEF jobs website using the link provided No later than 31st January 2022. The application package should include the following:

- a) A cover letter
- b) Detailed Curriculum Vitae
- c) A proposal with a detailed budget inclusive of estimated travel costs.
- d) Insert any additional requirements**

UNICEF is committed to diversity and inclusion within its workforce, and encourages all candidates, irrespective of gender, nationality, religious and ethnic backgrounds, including persons living with disabilities, to apply to become a part of the organization.

UNICEF has a zero-tolerance policy on conduct that is incompatible with the aims and objectives of the United Nations and UNICEF, including sexual exploitation and abuse, sexual harassment, abuse of authority and discrimination. UNICEF also adheres to strict child safeguarding principles. All selected candidates will, therefore, undergo rigorous reference and background checks, and will be expected to adhere to these standards and principles.

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