

TERMS OF REFERENCE FOR INDIVIDUAL CONSULTANTS/ CONTRACTORS



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Type of engagement:	<input checked="" type="checkbox"/> Consultant <input type="checkbox"/> Individual Contractor Part-Time
Title of engagement:	Facilitation of the 2024 Annual Review Meeting and 2025 Planning
Location: If remote or home-based, indicate. If contractor is not resident in host country, indicate if presence in host country and/or travel is required.	Remote with travel to Barbados
Duration: Number of working days	20 working days over 1 month <ul style="list-style-type: none"> • Preparation: 8 days • In-person facilitation: 3 days • Planning: 9 days
Start Date:	15 November 2024
End Date:	15 December 2024
Requesting Section:	Planning Monitoring and Evaluation
Supervisor:	Planning Monitoring and Evaluation Specialist

BACKGROUND (*)

UNICEF Office for the Eastern Caribbean (ECA) is conducting its 2024 end-of-annual review for a multi-country programme, covering 12 countries and territories from 27 – 29 November, based in Barbados. The review will follow the PPPx guidelines and will emphasize the connection between programme results, lessons learned, and actionable planning for the next year. The review process is a critical opportunity to ensure that country offices and territories align their annual planning with programme priorities, funding streams, and joint programmes.

The primary objective of this end-of-year review is to evaluate programme performance, identify lessons learned, and—most importantly—create clear, streamlined linkages between programme outcomes and forward-looking annual planning. This includes aligning planning with results-based frameworks, indicators, and funding mechanisms, ensuring that joint programming and collaborative opportunities are fully leveraged across the 12 countries and territories. As part of the review and planning process, UNICEF ECA is streamlining reporting and planning processes to improve overall resource management and results efficiency and is looking for an experienced facilitator to guide and facilitate the process.

The Consultant will support a results-driven process that leads to the creation of 12 integrated country-specific implementation plans. Each plan will link to multi-country goals, identify opportunities for joint programmes, and ensure funding streams and programme results are efficiently aligned. UNICEF and country offices in using review insights to develop these actionable, results-based plans.

Goal and Objective: Under the supervision of the PME Specialist, the Consultant will support UNICEF ECA in conducting a focused and results-driven end-of-annual review, emphasizing how programme results and lessons learned directly inform future planning. This includes ensuring that country-specific plans are aligned with multi-country goals, that funding streams are efficiently utilized, and that opportunities for joint programmes are maximized.

Key areas of focus include:

- Ensuring that results-based planning for the next year is directly informed by review findings.
- Aligning planning with funding priorities and donor expectations.
- Promoting coherence between individual country strategies and regional/multi-country objectives.
- Streamlining monitoring and reporting systems to support effective implementation of future programmes.
- The process will consist of three in-person review days, plus additional days for preparation, coordination, and reporting.

The Consultant will lead discussions, organize key findings, and help formulate plans and strategies that will guide annual planning at the country level, for a multi-country context.

Methodology:

The facilitator will employ a methodology that ensures the review process is tightly linked to future planning, funding, and programme implementation. The process will emphasize the translation of review findings into practical, actionable steps for the upcoming year, with a particular focus on creating synergy between country and multi-country plans, joint programming, and resource allocation.

Key Components of the Methodology:

1. Pre-Review Preparation and Consultation (8 days)

- **Document Review:** The Consultant will thoroughly review key materials such as the multi-country programme's results matrix, guidelines (UNInfo, PPPx, etc), and the field monitoring modules to understand the existing performance frameworks, funding mechanisms, and programme targets.
- **Consultation with UNICEF teams:** The Consultant will engage with key UNICEF programme teams and operations to gather insights into current planning and implementation challenges, funding concerns, and strategic priorities for the upcoming year.
- **Analysis of funding streams and Joint Programmes:** Review current funding arrangements and joint programme frameworks, identifying areas where further integration or coordination between countries or sectors could be improved.
- **Developing a Facilitation Plan:** The Consultant will design an agenda and approach for the 3-day in-person review, ensuring that discussions are structured to focus on planning for the next year, including how to address funding gaps, integrate joint programming, and streamline country-specific results frameworks – linking to the multi-country results.

2. In-Person Review Process (3 days): The core of the methodology will focus on facilitating dialogue and decision-making around linking review findings to forward planning. The facilitator will ensure that every discussion centres on:

- **Results-Based Planning for the Next Year:** Facilitating sessions to ensure the programme's achievements, challenges, and lessons learned are directly tied to 2025-2026 work plan. This will include ensuring that country offices understand how to adjust their plans to reflect both successes and gaps identified during the review.

- **Funding Alignment:** A critical focus will be on aligning programme planning with existing and upcoming funding sources. The facilitator will help identify where funds can be reallocated, what additional funding is required, and how joint programming might attract new funding streams.
- **Country-Specific and Sub-regional Coherence:** Ensuring that country-specific plans fit within the broader multi-country strategy and that there is coherence between national goals and regional priorities. The facilitator will support the identification of opportunities for joint or multi-country initiatives that can enhance resource efficiency and impact.
- **Joint Programming (integrated) Opportunities:** Discussions will focus on opportunities for joint programming, emphasizing collaboration between countries or sectors to maximize impact. The facilitator will support the identification of areas where countries can work together on shared priorities, funding proposals, and monitoring frameworks.
- **Streamlining Monitoring and Reporting:** Review the effectiveness of current field monitoring modules and identify how they can be streamlined to better support results-based management and reporting. The facilitator will ensure that future monitoring systems are designed to provide timely and relevant data for programme planning and donor reporting.
- **Country-Regional Coherence:** Ensuring coherence between individual country plans and multi-country strategic objectives, aligning national goals with broader sub-regional and regional priorities.

3. Post-Review Documentation and Planning (9 days)

- **Synthesis of Findings and Action Plan Development:** The Consultant will compile the key outcomes from the review sessions, ensuring a clear linkage between the review findings and the proposed annual plan. The action plan should address gaps in current programming, propose updates to the results matrix, and identify key steps for improving the effectiveness of field monitoring.
- **Final Report:** The Consultant will prepare a comprehensive report summarizing the review outcomes, the agreed-upon planning priorities, and recommendations for streamlining country office plans with multi-country objectives. This report will include:
 - Clear guidance on funding strategies, including how to optimize existing funding and pursue new funding opportunities.
 - Recommendations for integrating joint programming into country-level planning.
 - A revised results matrix that reflects the lessons learned and updated indicators.
 - Strategic recommendations on how to align programme planning with UNICEF's broader regional and global objectives.

2025-2026 Planning: Presentation of Final Plan: The consultant will support the 2025-2026 plans, ensuring integrating the review recommendations; and with the new business model initiative spirit of improving overall efficiency and effectiveness of UNICEF's programmes.

Deliverables:

1. **Facilitation Plan:** A detailed plan for facilitating the end-of-annual review, with a specific focus on ensuring alignment between programme results, annual planning, and funding streams.
2. **Facilitated Review Process:** Effective facilitation of the three-day in-person review, with discussions focused on future planning, funding alignment, and joint programming.
3. **Final Report and Action Plan:** A comprehensive report that synthesizes review findings and provides clear recommendations for optimizing funding, integrating joint programmes, and ensuring coherence between country and multi-country strategies.
4. **Updated Results Matrix:** A revised results matrix reflecting key changes to indicators and priorities, based on lessons learned and 2025-2026 planning discussions.

5. Support the development and review of the 12 country work plans aligned to the review findings and recommendation.

Key Activities/Tasks (*)	Deliverables/Outputs (*)	Duration (Est. days/months):	Due Date
Development of meeting agenda (including preparing material)	Annotated workshop Agenda	8 days	11/20/2024
Facilitation of Annual review meeting	Annual review findings and action summary report	3 days	12/6/2024
Support the revision of the 12 rolling workplan	12 revised workplans	9 days	12/15/2024

TRAVEL REQUIREMENTS*

This assignment will require travel outside ECA Duty Station to: [Click or tap here to enter text.](#)

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 the UNICEF ECA 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.

PAYMENT SCHEDULE

Payment of professional fees will be based on submission of agreed deliverables which receive satisfactory quality review. In general, individual contracts shall not allow for fee advances. However, a maximum of 30 per cent of the total contract value may be authorized by the Approving Authority in cases where advance purchases, for example for supplies or travel, may be necessary.

MINIMUM EXPERIENCE / QUALIFICATIONS (*)

<p>Education:</p> <p><input type="checkbox"/> Bachelors <input checked="" type="checkbox"/> Masters <input type="checkbox"/> PhD <input type="checkbox"/> Other</p> <p>Enter Disciplines:</p> <p>Advanced degree in the strategic management, business administration, policy, development studies, economics, development studies</p>	<p>Knowledge/Expertise/Skills required:</p> <ul style="list-style-type: none"> A minimum of 8 years' experience working in programme development Proven experience in facilitating programme reviews and supporting reporting, developing country programmes, preferably in country or regional contexts. Familiarity with UNICEF's PPPx guidelines or similar results-based management approaches, including practical experience in implementing the PPPx
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	<p>(country programme development, Programme Results Notes/Theories of Change).</p> <ul style="list-style-type: none"> • Expertise in results-based planning, monitoring, and evaluation frameworks. • Excellent communication, report writing, and facilitation skills. • Written and verbal fluency in English and excellent communication skills are required. • Experience working in the Caribbean is an asset.
<p>Years of Experience: Minimum of 8 years</p>	
<p>Language(s) needed if any: Fluency in English (written and verbal)</p>	

EVALUATION CRITERIA

- A. Technical Evaluation (75 points)
 - a. Minimum education required (10 points)
 - b. Experience in facilitation of UNICEF or UN agencies Country Offices strategic planning exercise (40 points).
 - c. Working experience in the Caribbean (25points)
- B. Financial proposal (25 points)

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.

The selected candidate is solely responsible to ensure that the visa (applicable) and health insurance required to perform the duties of the contract are valid for the entire period of the contract. Selected candidates are subject to confirmation of fully vaccinated status against SARS-CoV-2 (Covid-19) with a World Health Organization (WHO)-endorsed vaccine, which must be met prior to taking up the assignment. It does not apply to consultants who will work remotely and are not expected to work on or visit UNICEF premises, programme delivery locations or directly interact with communities UNICEF works with, nor to travel to perform functions for UNICEF for the duration of their consultancy contracts.

RECOURSE (*)

UNICEF reserves the right to withhold payment in case the deliverables submitted are not up to the required standard or in case of delays in submitting the deliverables on the part of the consultant. 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.

TITLE RIGHTS (*)

All materials created by the Contractor which bears a direct relation to, or is made in order to perform, this contract and any intellectual property rights thereof, including but not limited to patents, copyright and trademarks, shall be jointly owned by UNICEF and the Contractor. At the request of UNICEF, the Contractor shall assist in securing such property rights and transferring them to UNICEF in compliance with the requirements of the law governing such rights. Any third-party usage shall require written permission from both parties.

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.

- [General Information Security Awareness Course](#)
- [Fraud Awareness](#)

HOW TO APPLY (*)

Prospective consultants should apply through UNICEF jobs website using the following link *Insert link (HR)* No later than *Insert date*. The application package should include the following:

- a) A cover letter.
- b) Detailed Curriculum Vitae
- c) A financial proposal stipulating all-inclusive fees, including lump sum travel and subsistence costs, as applicable.

UNICEF is committed to [diversity and inclusion within its workforce](#), and encourages all candidates, irrespective of gender, nationality, religious or ethnic background, and persons with disabilities, to apply to become a part of the organization. To create a more inclusive workplace, UNICEF offers paid parental leave, breastfeeding breaks, and reasonable accommodation for persons with disabilities. UNICEF strongly encourages the use of flexible working arrangements. Click [here](#) to learn more about flexible work arrangements, well-being, and benefits.

According to the UN Convention on the Rights of Persons with Disabilities (UNCRPD), persons with disabilities include those who have long-term physical, mental, intellectual, or sensory impairments which, in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others. In its Disability Inclusion Policy and Strategy 2022-2030, UNICEF has committed to increase the number of employees with disabilities by 2030. At UNICEF, we provide [reasonable accommodation](#) for work-related support requirements of candidates and employees with disabilities. Also, UNICEF has launched a Global Accessibility Helpdesk to strengthen physical and digital accessibility. If you are an applicant with a disability who needs digital accessibility support in completing the

online application, please submit your request through the accessibility email button on the UNICEF Careers webpage [Accessibility | UNICEF](#).

UNICEF does not hire candidates who are married to children (persons under 18). 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 based on gender, nationality, age, race, sexual orientation, religious or ethnic background or disabilities. UNICEF is committed to promote the protection and safeguarding of all children. All selected candidates will, therefore, undergo rigorous reference and background checks, and will be expected to adhere to these standards and principles. Background checks will include the verification of academic credential(s) and employment history. Selected candidates may be required to provide additional information to conduct a background check, and selected candidates with disabilities may be requested to submit supporting documentation in relation to their disability confidentially

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Remarks:

Only shortlisted candidates will be contacted and advance to the next stage of the selection process.

Individuals engaged under a consultancy or individual contract will not be considered “staff members” under the Staff Regulations and Rules of the United Nations and UNICEF’s policies and procedures and will not be entitled to benefits provided therein (such as leave entitlements and medical insurance coverage). Their conditions of service will be governed by their contract and the [General Conditions of Contracts for the Services of Consultants and Individual Contractors](#). Consultants and individual contractors are responsible for determining their tax liabilities and for the payment of any taxes and/or duties, in accordance with local or other applicable laws.