



TERMS OF REFERENCE

Consultancy for the Design and Implementation of Community-based Advocacy Strategies to promote inclusion of Vulnerable Groups in Community, National and Sub-regional decision making fora in five OECS countries

Project Title:	<u>Multi-Dimensional Approaches to Poverty Eradication in the Eastern Caribbean Project (MDAPP)</u>
Contract period:	9 January 2016 to 30 June 2017
Contract months:	6 months
Contract Type:	UNDP Professional Services Contract
Location:	Antigua and Barbuda, Commonwealth of Dominica, Grenada, Saint Lucia, Saint Vincent and the Grenadines
Implementing Partner:	OECS Commission
Contracting Authority:	United Nations Development Programme (UNDP)

Background

The Multi-Dimensional Approaches to Poverty Eradication in the Eastern Caribbean Project was initiated in 2015 with technical support from the UNDP Sub-regional Office in Barbados and funding from the Government of Chile. The OECS Commission, through the Social Development Unit, serves as the main implementing agency for the project. The project is designed to promote a multi-dimensional approach in the definition, measurement and eradication of poverty in five OECS member states, namely, Antigua and Barbuda, Dominica, Grenada, Saint Lucia and St. Vincent and the Grenadines.

The initiative is contextualized by the reality that access to relevant data for human rights based and gender responsive decision making is necessary for addressing structural inequalities which create the conditions under which people become marginalised and impoverished. Therefore, multi-dimensional approaches to poverty eradication present opportunities to identify and articulate the extent of deprivations being faced by individuals and households. Furthermore, community based ownership of poverty eradication programmes, training and capacity building initiatives are pivotal for ensuring the relevance and sustainability of programmes. For example, focusing on 'green' jobs or entrepreneurship enterprises related to renewable energy will not only provide access to emerging and growing markets, but will also increase access of communities to renewable/sustainable energy sources.

The MDAPP intends to support the enhancement of livelihoods of persons who are dependent on the informal economy by providing skills development, vocational and educational training and support to initiatives aimed at developing self-employment and job creation. Priority areas for the project include, but are not restricted to, increasing the employability and productivity of persons considered as vulnerable, marginalised and at-risk. These persons are largely dependent on the informal economy, and this project will aim to strengthen their participation in the national economy. In addition, through the strengthening of interested organisations at the community and national levels, the intended result is that

the participation of marginalized persons in community, national and sub-regional governance mechanisms will also thus be strengthened.

Recognizing that policy-making and decision-making are constrained by the lack of social data the UNDP, as a key regional development partner, convened statisticians and policy-makers from across the sub-region to remedy the paucity of data (and in turn engender data-driven, targeted initiatives). This was done through the localization of a multidimensional approach to poverty and closer monitoring of the Millennium Development Goals (MDGs). MDG Acceleration plans led to focused vocational training for the poorest communities in Dominica and to increased efforts to support young people's skills to enter the labour market in Grenada. Additionally, small scale activities were implemented in 2012 and 2013 aimed at building employability and entrepreneurial skills amongst youth, as well as implementing for the first time, a business accelerator programme.

These actions correspond directly to a long standing relationship between the Organisation of Eastern Caribbean States (OECS) Commission and the UNDP Barbados. This project serves to build on UNDP support for activities for a multidimensional approach to poverty measurement (MPM). For this project, OECS member states have agreed to pilot a short term annual measure, as well as a longer term 5-year measure, with a view towards sub-regional adoption and the development of the MPM in partnership with UN Agencies under the United Nations Development Assistance Framework (UNDAF). The ultimate goal of this work is to support evidence based policy making for poverty eradication in the sub-region.

Of critical importance is the project's focus on complementing UNDPs work on the quantitative measurement of poverty, that is, the Multi-Dimensional Poverty Index (MPI). The dimensions and indicators for the index have recently been developed in collaboration with the OECS Living Standards Measurement Committee (LSMC) and are currently being implemented across the OECS as integrated into the Harmonised Labour Force Survey (LFS). Qualitative MPM work should therefore be in alignment with the quantitative work being undertaken. The MPI is calculated using the Alkire-Foster method as put forward by the Oxford Poverty and Human Development Initiative (OPHI).

The work of Alkire and Foster was heavily influenced by the work of Amartya Sen; in particular, the capabilities approach, also known as the human development approach. The UNDP Human Development Report (HDR) for 2014 notes that a human development perspective on vulnerability suggests the importance of "the role of people's capabilities in minimising adverse consequences from shocks and persistent threats. It also unearths important factors underlying vulnerability, such as exclusion and discrimination that would not be evident from a risk based approach alone (HDR 2014, 17)." The MDAPP will therefore work towards developing a qualitative multi-dimensional poverty instrument which will complement the quantitative measurement of multi-dimensional poverty in the region.

Why Multidimensional Poverty?

High levels of poverty is a persistent reality in the sub-region. Social Development gains remain threatened by current economic realities that are less than favourable for increased expenditure on interventions for poverty reduction. 2014 continued to be a challenging year for the Organisation of Eastern Caribbean States (OECS) Member States. Rather than experiencing a substantial economic rebound as hoped, the sub-region continued to grapple with low to negative economic growth, well below the projected global average of 3% and the average of 2.75% in the Latin America and Caribbean (LAC) Region. The deterioration of fiscal resources and financial institutions, rising unemployment, high levels of youth unemployment and labour instability, high debt-to-GDP ratios ("ranging from 73% to 116% of GDP") and

other factors, narrowed governments' scope for managing the financial recovery and facilitating sustainable development.

Governments have been forced to adopt stringent fiscal measures they previously avoided and to produce austerity budgets with marked reductions in public expenditure. These national and sub-regional development challenges are all compounded by the increased incidences of natural hazards and the impacts of climate change that continue to threaten the development gains in these countries. MDAPP presents the opportunity, within the sub region for adopting novel efforts towards addressing poverty in times of austerity.

How we measure poverty can importantly influence how we come to understand it, how we analyze it, and how we create policies to influence it. For this reason, measurement methodologies can be of tremendous practical relevance. Most countries of the world define poverty in a unidimensional way, using income or consumption levels. But persons living in poverty go beyond income in defining their experience of poverty. They often include feelings of humiliation, a lack of education, health, housing, empowerment, employment, personal security and more. No one indicator, such as income or consumption, is uniquely able to capture the multiple aspects that contribute to poverty. Furthermore, levels and trends of income poverty are not highly correlated with trends in other basic variables such as child mortality, primary school completion rates, or undernourishment (Bourguignon et al 2010: 24, 27). A person or household can be income poor but multi-dimensionally non-poor, or income rich but in multi-dimensional poverty.

In recent years, the literature on multi-dimensional poverty measurement has blossomed in a number of different directions. The 1997 Human Development Report and the 2000/1 World Development Report vividly introduced poverty as a multi-dimensional phenomenon, and the Millennium Declaration and Millennium Development Goals (MDGs) have highlighted multiple dimensions of poverty since 2000. New academic measurement methodologies are being created. At the same time, the number of countries conducting multi-topic household surveys that provide the required inputs for the construction of multi-dimensional measures have increased dramatically from the mid-1980s, to around 130 developing countries at present. This phenomenon, together with advances in techniques and the increasing demand to understand poverty and social policies, generate a unique framework for the implementation of these kinds of measures. The qualitative tools which will be developed through the MDAPP will be designed to capture data on the various components of poverty and on access to basic services particularly among vulnerable populations.

OBJECTIVE

The Project will contribute to the supporting of Multi-Dimensional Approaches to Poverty Eradication in the Eastern Caribbean, focusing on the achievement of the following main objectives:

1. To support community based capacity building and training designed to increase the economic participation of marginalised groups including women, youth and persons with disabilities;
2. To support community based advocacy activities intended to promote inclusion of vulnerable groups in community, national and sub-regional decision making fora;
3. To support the development of relevant qualitative data collection tools which are fully compatible and/ or can inform sub-regional and country qualitative multidimensional poverty measures; and

4. To undertake targeted, poverty focused qualitative research exercises at the community level which will serve as the evidence for national and Sub-regional poverty reduction programmes and initiatives.

PURPOSE OF THE CONSULTANCY

The purpose of the consultancy is to ensure that evidenced-based advocacy arrangements are in place to promote the inclusion of vulnerable groups in community, national and sub-regional decision-making fora.

Scope of Work

In alignment with the overall purpose of the consultancy, under the direction of the Project Board and Project Coordinator, and in close consultation with the UNDP Sub-Regional Office for Barbados and the OECS, the Consulting Firm will:

1. **Conduct multi-dimensional poverty research and compile learning materials based on the lived realities of specific vulnerable and marginalised groups in project countries.**

This research activity is aimed at capturing the lived reality of vulnerable groups on their experience with multi-dimensional poverty. It will involve the design of data collection tools that will facilitate participatory research on experiences of women, youth, persons with disabilities and the elderly.

These exercises should provide recommendations for the design of tools for multi-dimensional poverty measurement in the OECS. Research findings should also inform the development of learning materials for advocacy and education communication strategies, for promoting inclusion and participation of vulnerable groups in processes aimed at overcoming multidimensional poverty. The Consulting firm will:

- 1.1 Engage in an inception meeting with the Project Coordinator and stakeholders to become familiar with the project, review project documents (including the findings of the Gap Analysis) and discuss the process for conducting the assignment.
- 1.2 Establish a working connection with the Focal Points from the Ministry of Social Development (or similar ministry) in each beneficiary country, as well as consult with a cross-section of stakeholders, including organizations that represent marginalized persons in the countries involved in the project.
- 1.3 Design a robust methodology for the PAR which should include the research design and methods, interview tools, analytical framework, Advocacy and Information Education Communication Strategy development approaches.
- 1.4 Develop Research Plan and coordinate the research activities (location, time frame, movement of persons etc.) in collaboration with relevant stakeholders and Focal Points Representatives.
- 1.5 Develop the relevant tools and conduct research using mixed methods (including Participatory Action Research) with marginalized groups to capture their lived reality in the experience of multidimensional poverty. Collaborate with community representatives, national Focal Points and Project Coordinator in preparing logistics for the data collection component of the research, including the preparation of a budget, identification of suitable venues and resource persons to facilitate execution of research.

- 1.6 Conduct multi-dimensional poverty research on the lived realities of vulnerable groups in the five project countries. In collaboration with Focal Points, identify key stakeholders who could provide and facilitate access to vulnerable groups (*i.e. women, youth, the elderly, persons with disabilities and the sub-groups within them*) who could participate in the research exercise. These may include community leaders of youth and women's groups, and persons who provide services to the vulnerable groups. It is equally important to identify the vulnerable and marginalised who are not aligned to any formal grouping or institution. The findings of the research should be integrated in the development of advocacy material. This material will be designed to influence and access various national and regional social, economic and political stakeholders through participatory community activities to promote the multi-dimensional approach, and rights of vulnerable groups among key stakeholders. Both the research and advocacy material should take into account the specific needs and the social and physical abilities and challenges of persons from different groups, as well as raise awareness among them and among various stakeholders of their potential and ability for advocating for themselves for change in their circumstances and to be included in various aspects of society.
- 1.7 Prepare report documenting the results of the research in the five countries and present recommendations for utilising the research tools in future research on multi-dimensional poverty in the OECS.

2. **Design and develop effective advocacy strategies based on multi-dimensional poverty research findings. These strategies should be designed to influence and access various national and regional social economic and political stakeholders.**

The consultants are expected to integrate research participants as well as research findings to develop effective advocacy strategies. The expectation is that the involvement of the research participants will allow for raising awareness among the vulnerable groups and the broader society about their power of agency, their rights to participation in decision making with various national and regional social and economic political stakeholders. It will also allow for increased participatory planning for multi-dimensional poverty eradication. The Consultant is expected to:

- 2.1 Include in the work plan the approach to design and develop Advocacy Strategies in collaboration with main stakeholders.
- 2.2 Identify and collaborate with local stakeholders involved in advocacy work.
- 2.3 Conduct sensitization activities to mobilise and encourage key stakeholders to participate in development of advocacy strategies, particularly the advocacy material that will incorporate narratives on the experience of multi-dimensional poverty from vulnerable and marginalised groups.
- 2.4 Collaborate with community representatives, national focal points and Project Coordinator in preparing logistics for the data collection activities, including the identification of suitable venues and resource persons. This will also apply to the design of the Advocacy Strategies.
- 2.5 Identify research participants for the advocacy component and secure their participation in the use of their narratives, in the development of strategy material. This may involve the use of various media to capture these narratives.
- 2.6 Engage with local programmes/organizations that are involved in advocacy.
- 2.7 Include in the final report, an account of the process leading up to the design and development of the Advocacy Strategies. Also account for issues related to the sustainability of the strategies.

3. **Design and implementation of a comprehensive Information Education Communication (IEC) Strategy.** This should include the development of associated didactic materials and activities, to promote inclusion and participation of vulnerable groups in processes aimed at overcoming multi-dimensional poverty in specific national contexts. The Firm will:
 - 3.1 Incorporate in the work plan the approach to the design and development of the Information Education Communication (IEC) Strategy, in collaboration with main stakeholders.
 - 3.2 Conduct sensitization activities with relevant local and regional stakeholders with experience in the development of Information Education Communication (IEC) to gain their input in material designed. This will ensure that material is suited for the local realities of each study country.
 - 3.3 Upon finalization of the design for the various strategies, work with the OECS/UNDP project team and national focal points to coordinate the implementation of the IEC strategy.
 - 3.4 Prepare and execute an implementation plan for the Information Education Communication (IEC) Strategy.
 - 3.5 Develop monitoring tools to monitor the implementation and impact of the **Advocacy and Information Education Communication (IEC) Strategy**.
 - 3.6 Include in consultancy report issues resulting from the design and implementation of the Information and Education Communication (IEC) Strategy. Include suggestions for the future sustainability of the Strategy.

Key experts from the Consulting firm are expected to travel to the project countries at various stages of the assignment. Additionally, the firm will consider the following:

RESEARCH GUIDELINES

- a. The research must be in alignment with the human development approach and therefore take a human rights based approach to training design and delivery. It must be in alignment with the UNDP Sub-Regional Office's work on the Multi-Dimensional Poverty Index (MPI) and the Oxford Poverty and Human Development Institute's, specifically in keeping with the Capabilities Approach. For example: while designing and conducting the research, it must be taken into consideration that different marginalized groups, as well as subgroups within them, might have different requirements in order to ensure their participation. Planning should also take into account the fact that different persons face different barriers to participation. These may be physical, structural, institutional, cultural or attitudinal in nature and may affect persons at individual, family or community levels).

See: <http://www.ophi.org.uk/wp-content/uploads/OPHI-HDCA-SS11-Intro-to-the-Capability-Approach-SA.pdf>

See: https://mpra.ub.uni-muenchen.de/8862/1/MPRA_paper_8862.pdf
- b. The research must be gender responsive and gender sensitive. Where necessary, child care services should be arranged for women who would otherwise be unable to take part in research activities such as scheduled focus group discussions.

- c. Research activities must also be accessible and cater to the different physical and mental capabilities of the participants (deaf, blind, learning challenges, mobility devices etc.)
- d. The research should as much as possible involve local stakeholders and make use of local resources (for e.g. indigenous communication mechanisms), in the 5 MDAPP pilot countries.

DELIVERABLES

Payments shall be made to the Consulting Firm upon receipt and satisfactory acceptance of the specified deliverables and in accordance with the following schedule:

#	Deliverables/Output	Potential Dates	Percentage of Payment
1	Inception report <ul style="list-style-type: none"> • Scope of work • Methodology and implementation plan 	Within 14 days after contract signature	15%
2	Report on data collection exercises <ul style="list-style-type: none"> • Methodology • Main Findings • Implications for Advocacy and IEC Strategies 	Within 2 months after contract signature	30%
3	Report on design and implementation of Advocacy and IEC Strategies to include: <ul style="list-style-type: none"> • Community Advocacy Strategies • IEC Strategies • Implementation Experiences • Monitoring tools 	Within 4 months after contract signature	30%
5	Final report <ul style="list-style-type: none"> • Strategies employed • Anticipated impact • Challenges 	Within 5 months after contract signature	25%

Qualifications

Team Leader

Academic qualifications

- At least a Master's degree in one of the following areas: Sociology, Social Policy, Population/Demography, Psychology, Development Studies, Project Management or a related field.

Experience

- At least three years of relevant work experience in social research, particularly qualitative data collection and analysis, preferably within the OECS region.
- Experience in human rights based and gender responsive, poverty reduction initiatives focusing on socio-economic development, monitoring, social protection and/or employment generation policies and programmes.
- Demonstrated knowledge and understanding of multi-dimensional approaches to poverty measurement and programming as in accordance with the human development approach.
- Experience in designing and executing mixed method research.
- Experience in advocacy.
- Demonstrated experience leading field and/or research teams.
- Experience in the Caribbean or SIDS is highly desirable

Competencies

- Demonstrated experience working with national governments, communities, and diverse stakeholder groups
- The ability to analyse and synthesize data from a wide variety of sources, and present the resulting information in a clear and concise format.
- Excellent report writing, editing, conceptual, analytical and communication skills. Ability to work independently, manage competing priorities and perform well under pressure.
- Excellent inter-personal and negotiation skills to effectively liaise with key stakeholders
- Strong oral and written communication skills with a proficiency in English
- Demonstrated competencies in computer-based word processing and spreadsheet applications, workshop organization, public speaking and sensitivity to cultural differences.

Communications Specialist

Academic qualifications	<ul style="list-style-type: none">• At least a first degree, and experience in one of the following areas: Education, Communication and Media Studies, Public Relations, Journalism, Production, Marketing including Social Media Marketing or related field.
Experience	<ul style="list-style-type: none">• Demonstrated experience working with national governments, communities, and diverse stakeholder groups• At least three years of relevant work experience in designing information and education communication material.• Experience in human rights based and gender responsive, poverty reduction initiatives focusing on socio-economic development, monitoring, social protection and/or employment generation policies and programmes.• A minimum of 3 years of relevant experience in the field of development, working with human development planning processes in the OECS region.• Experience in advocacy and the use of a variety of communications media to effectively reach different target audiences.• Experience with information technology and use of social media.• Experience in the Caribbean or SIDS is highly desirable
Competencies	<ul style="list-style-type: none">• The ability to design and implement effective education strategies.• The ability to lead in the design of effective advocacy strategies.• Excellent report writing, editing, conceptual, analytical and communication skills.• Excellent inter-personal and negotiation skills to effectively liaise with key stakeholders.• Strong oral and written communication skills with a proficiency in English.

CONSTRAINTS

This is a multi-country project and will involve travel to all five project countries. All envisaged travel costs will be included as part of the Contract. This will include all duty travels to-and-from and within the designated countries. In the event of unforeseeable travel, the respective Business Unit and the Consulting Firm will agree upon the manner in which travel costs including tickets, lodging and terminal expenses are to be reimbursed prior to travel.

Regardless of purpose of travel, the prevailing price for an economy class tickets serving the most direct routes to be travelled shall apply. In general, the OECS Commission should not accept travel costs exceeding those of a full-fare economy class ticket. Consultants wishing to upgrade their travel to business or first class shall do so at their own expense.

REPORTING

Consultant will report directly to the UNDP Project Coordinator for the MDAPP based at the OECS Commission, Social Development Unit in Castries, Saint Lucia. The sharing consultancy updates and reports is expected.

The UNDP and OECS agrees to:

- (a) Review and provide feedback on consultancy deliverables

- (b) Provide the Consulting Firm with all necessary logistical support to ensure that the Consulting Firm undertakes the consultancy with reasonable efficiency;
- (c) Allocate a point person(s) to support the Consulting Firm during the process;
- (d) Meet all the agreed cost related to the consultancy;
- (e) Provide relevant documents and make all necessary contacts that may be needed; and Guide the consultancy as needed and necessary

UNDP RECOURSE

The UNDP reserves the right to withhold all or a portion of payment if performance is unsatisfactory, if work outputs are 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 UNDP and counterpart feedback.

PROPERTY RIGHTS

The OECS 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 the UNDP.

LANGUAGES:

Excellent verbal and writing communication skills in English are required. Competency in French Creole would be regarded as an asset.