

Terms of reference



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GENERAL INFORMATION

Title: Monitoring and Evaluation Expert For Social and Islamic Finance Portofolio (International Consultant)

Project Name : Social and Islamic Finance Portofolio

Reports to: Senior Programme manager for Climate Change

Duty Station: Home-based with travels to Jakarta, Indonesia

Expected Places of Travel (if applicable): UNDP Office Jakarta Indonesia

Duration of Assignment: 10 working days within 2 (two) months

REQUIRED DOCUMENT FROM HIRING UNIT

V	TERMS OF REFERENCE
	CONFIRMATION OF CATEGORY OF LOCAL CONSULTANT , please select : (1) Junior Consultant (2) Support Consultant (3) Support Specialist (4) Senior Specialist (5) Expert/ Advisor CATEGORY OF INTERNATIONAL CONSULTANT , please select : (6) Junior Specialist (7) Specialist (8) Senior Specialist
8	
V	APPROVED e-requisition

REQUIRED DOCUMENTATION FROM CONSULTANT

<input checked="" type="checkbox"/>	Completed CV or P11 with at least three referees
<input checked="" type="checkbox"/>	Copy of education certificate
<input checked="" type="checkbox"/>	Completed financial proposal
<input checked="" type="checkbox"/>	Completed technical proposal

Need for presence of IC consultant in office:

☒ partial (explain) requires a number of meetings in UNDP Indonesia Country Office, Jakarta, office to discuss progress

☐ intermittent (explain)

☐ full time/office based (needs justification from the Requesting Unit)

Provision of Support Services:

Office space: ☐ Yes ☒ No

Equipment (laptop etc): ☐ Yes ☒ No

Secretarial Services ☐ Yes ☒ No

I. BACKGROUND

Official development assistance and finance has helped improve socio-economic and political conditions in a range of developing countries globally. While much progress has been made, there is a growing recognition of limits of the way that ODA (not to mention the current constraints to public policy from the global crises and policies of budget austerity) has been disbursed as well as awareness that private sector and the market have a more significant role if the global community is to achieve Sustainable Development Goals. In this context, there has been an increased attention to impact investment and its value in development and public policy.

Social finance is an emerging trend that holds promise in addressing above noted limits. It helps leverage both public and private sector funding toward a system level policy issues (outcomes) in turn helping make development progress scalable and financially sustainable. Over the last decade, it has become a significant driver of investment into public goods and has also led to the creation of innovative models of financing and is beginning to attract the attention of policy makers across the Asia Pacific region albeit unevenly.

Demonstrating the relevance of innovation as a critical design principle for programming is a key priority for the UNDP Regional Bureau of Asia and Pacific. Support has been provided to Country Offices in the region to advance the innovation agenda by providing the creative space and discretionary resources to prototype innovative solutions and experiment with new ways of working to tackle complex development challenges outside the traditional business cycle. Particular emphasis has been placed on nurturing innovative tools, techniques and approaches, especially on data and design.

In response to the growing demand to unpack the social finance landscape and with the emergence of innovative models of financing that are wide ranging, the region is now focusing on providing policy and programmatic support to UNDP activities in the Asia and Pacific region that explore and test the research on this area. Throughout UNDP's programmatic focus areas, it assists Country Offices in development and implementation of initiatives and at the regional level, it conceptualizes and implements activities in partnership with a wide range of partners. Given Indonesia's position economically and its growth story, as well as demand emerging from Government, this assignment will focus on the Indonesian context to demonstrate proof of concept and scope the opportunities and establish evidence to provide advice on policy and regulatory frameworks as well as on the ground feasibility.

II. SCOPE OF WORK, ACTIVITIES, AND DELIVERABLES

The monitoring and evaluation (M&E) consultant will be responsible for the development of an M&E Framework for the project. See expected deliverables for Further explanation.

The M&E consultant will develop the M&E framework for the project in consultation with project colleagues, namely, the gender advisor, the social enterprise consultant, UNDP's Senior Programme Manager for Climate Change, the GoI counterpart on the projects, OJK and other stakeholders such as The Islamic Development Bank.

Expected outputs/Deliverables

- 1) An initiation report of consultations held with consultants and stakeholders involved outlining the theory of change of the project, including achievable end-of-project-outcomes.
- 2) A monitoring and evaluation framework for the project including: risks and assumptions; key evaluation questions; and well defined indicators, inclusive of gender specific parameters.

Expected Outputs and Deliverables

The assignment will be delivered within 2 months, with 10 working days, which includes meetings in Jakarta as necessary and feasible. Schedule of payment will be in accordance with the timetable noted below:

Deliverables/ Outputs	Estimated number of working days	Completion deadline	Review and Approvals Required
1 st payment will be made upon submission and approval by UNDP of the following output: An initiation report of consultations held with consultants and stakeholders involved outlining the theory of change of the project, including achievable end-of-project-outcomes.	5	June 2017	UNDP Senior Program Manager for Climate Change, UNDP Indonesia
2 nd payment will be made upon submission and approval by UNDP of the following output: A monitoring and evaluation framework for the project including: risks and assumptions; key evaluation questions; and well defined indicators, inclusive of gender specific parameters.	5	July 2017	

III. WORKING ARRANGEMENTS**Institutional Arrangement**

1. Consultant will present outline to UNDP Indonesia
2. Consultant will have meetings with relevant stakeholders
3. Consultant will conduct research (desk research and interviews) with relevant stakeholders
4. Consultant will report progress on a weekly basis
5. Consultant will submit an initiation report and a final report outlining the M&E Framework

Duration of the Work

10 working days (June to July 2017)

Duty Station

Home based with meeting(s) in UNDP Indonesia office, Jakarta

Travel Plan

There may be unforeseen travel that will come up during the execution of the contract which will be agreed on ad-hoc basis.

No	Destination	Frequency	Duration/days
1	Jakarta	1 Times	2 overnights stays in total

IV. REQUIREMENTS FOR EXPERIENCE AND QUALIFICATIONS

Education Qualification:

PhD or Master Degree in qualitative research the development field (anthropology, sociology, economics) and/or monitoring and evaluation related to the development sector.

Working experience:

- Minimum 15 years' experiences for Master Degree and 6 six years' experiences for PhD at the intersection of qualitative research and monitoring and evaluation in the development sector, with a specific emphasis upon designing and managing social research projects and monitoring and evaluation programs.
- Working experience in the field of social entrepreneurship, social finance and/or impact investing will be considered an asset.
- Having working experience in Indonesia will be considered as an asset
- Practical, proven experience in field work related Social and Islamic Finance Portofolio is much valued.

III. Competencies and special skills requirement:

Corporate competencies:

- Strong client orientation and accountability;
- Creativity in deconstructing issues and coming up with solutions;
- Effective both written and spoken communication;
- Flexibility and adaptability to changes and tolerance to uncertainty;
- Strong teamwork, especially considering the balancing act between regional and priorities of individual countries.

Functional competencies:

- Sensibility to partnership building and maintenance, especially in light of the part of assignment focusing on resource mobilization;
- Efficient planning and organization in regard to the assignment;
- Ability to conduct system level analysis, to move beyond functional silos of development work and design interventions on an outcome level.

Excellent writing, editing, and oral communication skills in English. Strong Indonesian language skills is an asset.

V. EVALUATION METHOD AND CRITERIA

Individual consultants will be evaluated based on the following methodologies:

Cumulative analysis

When using this weighted scoring method, the award of the contract should be made to the individual consultant whose offer has been evaluated and determined as:

- a) Responsive/compliant/acceptable, and*
- b) Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.*

- *Technical Criteria weight: 70 %*
- *Financial Criteria weight: 30 %*

Only candidates obtaining a minimum of 70 point of Technical Evaluation would be considered for the Financial Evaluation

Criteria	Weight	Maximum Point
<u>Technical</u>		100
<i>Criteria A: qualification requirements as per TOR:</i>		60
1. PhD or Master Degree in qualitative research the development field (anthropology, sociology, economics) and/or monitoring and evaluation related to the development sector.	60%	20
2. Minimum 15 years' experiences for Master Degree and 6 six years' experiences for PhD at the intersection of qualitative research and monitoring and evaluation in the development sector, with a specific emphasis upon designing and managing social research projects and monitoring and evaluation programs.		10
3. Working experience in the field of social entrepreneurship, social finance and/or impact investing will be considered an asset.		10
4. Having working experience in Indonesia will be considered as an asset		10
5. Practical, proven experience in field work related Social and Islamic Finance Portofolio is much valued.		10
<i>Criteria B: Brief Description of Approach to Assignment:</i>		40
1. Understand the tasks and applies a methodology appropriate for the task as well as strategy in a coherent manner	40%	20
2. Important aspects of the tasks addressed clearly and in sufficient detail		10
3. Logical, realistic planning for efficient implementation and results		10