



TERMS OF REFERENCE

Individual Consultant: Promoting and Celebrating SDG Integration by Trinidad and Tobago Businesses

1. Introduction/Background

Achieving the 2030 Agenda's 17 Sustainable Development Goals (SDGs) requires substantial modifications to societal, economic and environmental-exploitation patterns that are possible only with full and strategic private sector participation. The private sector consists of a wide diversity of fields and complex activities. It is the largest part of the economy; the main creator of jobs and user of natural resources; a key source of knowledge, expertise, technological innovation, financial resources and government tax income; and a chief beneficiary of public institutions and infrastructure. The consequences of unsustainable business development (e.g., climate change, negative impacts on human health and the environment, and increased inequalities) are also becoming increasingly apparent, and have been exacerbated by the COVID-19 pandemic. Recognising that the private sector is a key component and driver of sustainable development's economic, social and environmental spheres, the 2030 Agenda was developed to encourage companies to integrate the SDGs as fundamental elements of their strategies and operations, as well as to ease reporting by businesses on their SDG-related accomplishments.

The SDGs' newness, breadth and perceived complexity have hindered implementation of the Goals by Trinidad and Tobago's (TTO's) private sector; and have led to insufficient awareness of the SDGs' benefits and implications among companies' CEOs and Directors, resulting in insufficient SDG integration into businesses' planning, policies and operations, as well as inadequate reporting by TTO firms of their SDG-related accomplishments. That TTO private sector leaders are generally unfamiliar with the SDGs has resulted in companies integrating primarily those Goals that explicitly address productivity and profitability (e.g., those related to workers' rights and regulatory compliance) into their core business strategies and operations—with the remaining SDGs frequently ignored or addressed only in the firms' philanthropy. Expanding the SDG-related knowledge and skills of executives (who are responsible for their companies' corporate strategy, policy, systems and processes, resourcing and investing, performance measurement, product and service redesign, change management, risk mitigation, regulatory compliance and accountability, and who are the public faces and voices of their corporations) would be an effective way to mainstream the Goals into their businesses. Additionally, with increased pressure on companies to thrive economically while also being impactful socially and environmentally, business leaders should now assess, not just financial value, performance and risks, but also consider and report on non-financial equivalents in an integrated way, across multiple capitals. Investors and customers, too, are increasingly preferring companies with operations and products that benefit the environment, society and governance in the countries they do business; and, by aligning their operations and production to the SDGs, firms can enhance their brand.

The TTO private sector's philanthropy is the anglophone Caribbean's most developed. TTO companies are generous, spending 2-4% of their annual expenditure on philanthropy. The impact of this considerable

philanthropy on national development is however marginal, as philanthropic interventions are rarely aligned with the SDGs and national development priorities; and are usually sub-optimally planned and implemented, with duplicated effort and inefficient use of resources, as they are monitored, evaluated and reported beneath the level needed for them to be evidence based. To rectify this, the TTO UN Country Team (UNCT) trained managers in the philanthropy departments and foundations of twelve large TTO companies on the SDGs, and on Goals-based methods for assessing their philanthropic investments' developmental impact. These companies, by themselves, give more than USD 18 million in philanthropy each year. That these and other companies' philanthropic interventions are only marginally impactful is unfortunate as the UNCT-engaged companies, once sensitised to the SDGs, indicated universal desire to invest in the Goals via their corporate giving. This may be indicative of a wider desire in TTO's private sector to align their philanthropy with the Goals. Additionally, corporate philanthropy is a key entry point to SDG assimilation into business strategies and operations as it requires companies becoming aware of social and environmental challenges in their communities, and formulating contradictory interventions.

As the UN champions direction of private resources to SDG accomplishment, the UNCT should build SDG awareness among business leaders; equip business executives and senior managers to adopt and report on integrated approaches where they engage with the SDGs on a strategic level; and provide SDG monitoring, evaluation and impact assessment support to companies that seek to integrate the SDGs into their operations, production and philanthropy. The UNCT should also celebrate corporations that accomplish the greatest developmental impacts while undertaking their business and philanthropy, and which serve as exemplars for others in the TTO and Caribbean private sector.

2. Key Elements and Specific Objectives

Purpose: The aim of this assignment is to contribute to increased and more-strategic integration of and investment in the SDGs by TTO businesses.

Strategy: To build SDG awareness among business leaders and provide SDG monitoring, evaluation and impact assessment support to companies that seek to integrate the SDGs into their operations, production and philanthropy; and celebrate firms that accomplish the greatest developmental impacts while undertaking their business and philanthropy, and that serve as exemplars for others in the private sector.

Outcomes:

1. Increased and more-strategic integration of, investment in, and reporting on the SDGs by five TTO businesses;
2. Increased and more-effective reporting on SDG-related, business-based accomplishments by five TTO businesses;
3. Increased SDG alignment of interventions financed by ten corporate philanthropic departments and foundations.

The Outputs are:

- 1.1. 15 executives and senior managers, from five companies that commit to integrating the SDGs and national development goals into their operations and production, sensitised to the SDGs and national development goals, and their business implications and benefits;
- 2.1. 50 hours of monitoring, evaluation and impact assessment support to company executives and senior managers from five firms that commit to integrating the SDGs and national development goals into their operations and production;

- 2.2. Two exemplary TTO companies selected for celebrating the developmental impact they achieve, in terms of the SDGs and national development goals, while undertaking their business;
- 3.1. 50 hours of monitoring, evaluation and impact assessment support to ten corporate philanthropy departments and foundations that commit to the SDGs and national development goals;
- 3.2. Three exemplary corporate philanthropists selected for celebration of the developmental impact of their philanthropy in terms of the SDGs and national development goals.

3. Scope of Consultancy Assignment

The Consultant shall undertake but not be limited to the following activities:

- 1.1.1. Undertaking sensitisation sessions/workshops (each at least three hours long and with related information products) on the SDGs, national development goals, and their business implications and benefits, to 15 executives and senior managers from five companies that commit to integrating the SDGs and national development goals into their operations and production;
- 2.1.1. Providing 50 hours of monitoring, evaluation and impact assessment support (including capacity building, if necessary, and employing the SDGs and national development goals' indicators and targets) to company executives and senior managers from five companies that commit to integrating the SDGs and national development goals into their operations and production;
- 2.2.1. Identifying, to a UNCT-chaired committee that includes senior representatives from TTO's public, private, civil society and international development sectors, two TTO companies that have achieved the greatest developmental impact through their business operations and production;
- 3.1.1. Providing 50 hours of monitoring, evaluation and impact assessment support (including capacity building, if necessary, and employing the SDGs and national development goals' indicators and targets) to ten SDG-committed corporate philanthropy departments and foundations;
- 3.2.1. Identifying, to a UNCT chaired committee that includes senior representatives from TTO's public, private, civil society and international development sectors, three TTO companies that have achieved the greatest developmental impact through their philanthropy.

4. Methodology

The Consultant will develop a technically sound methodology in accordance with international SDG sensitisation, monitoring, evaluation and impact assessment standards, and which maximises beneficiary participation and is consistent with the SDGs and TTO's Vision 2030 National Development Plan.

The method will include:

- On-site visits to executives and senior managers at five companies that commit to integrating the SDGs and national development goals into their operations and production;
- On-site visits to ten corporate philanthropic departments and foundations (of companies that commit to earmarking 30% of their philanthropy to actions aligned with the SDGs' indicators);
- Providing monitoring, evaluation and impact assessment support (including capacity building, if necessary, and employing the SDG indicators and targets) to executives and senior managers at five companies that commit to integrating the SDGs and national development goals into their operations and production;
- Providing monitoring, evaluation and impact assessment support (including capacity building, if necessary, and employing the SDG indicators and targets) to managers of corporate philanthropy at ten companies or their philanthropic foundations;

- Ranking the five considered companies in order of their operations and production's developmental impact in TTO (in terms of the SDGs and national development goals), highlighting the top two;
- Ranking the philanthropic departments and foundations, and parent companies, in order of their developmental impact in TTO, highlighting the top three.

5. Working Arrangements

- The Consultant will work under the overall guidance of UN Resident Coordinator (RC) and the UNCT.
- The Consultant will be supervised by the Team Leader of UN Resident Coordinator Office (RCO), under the overall guidance of the RC.
- The Consultant will work daily with the RCO and UNCT focal points, who will guide their work.

Responsibilities of the UNCT:

- Under the RC's leadership, the UNCT will identify five companies that commit to integrating the SDGs and national development goals into their operations and production, as well as the executives and senior managers to be directly supported by the Consultant, and secure this commitment by having the businesses' CEOs or Chairpersons sign a Call to Action for SDG-related business approaches.
- Under the RC's leadership, the UNCT will identify 10 companies to commit 30% of their philanthropy to actions directly aligned with the SDGs' indicators, and secure this commitment by having the businesses' CEOs or Chairpersons sign a Call to Action for SDG-related philanthropy.
- Under the RC's leadership, the UNCT will guide the Consultant in formulating the work's methodology, preparing the assignment's deliverables, and revising the deliverables, and will assist the Consultant with accessing stakeholders (including the SDG committed companies), documents and virtual or physical spaces for meetings and consultations.
- Under the RC's leadership, the UNCT will convene, chair, and develop Terms of Reference for a committee (that includes senior representatives from TTO's public, private, civil society and international development sectors) to identify, from the Consultant's rankings, the companies and philanthropic organisations that are achieving the greatest developmental impact in TTO.

Responsibilities of the Consultant:

- Under the overall guidance of the UNCT focal points, the Consultant will implement actions to support executives and senior managers at the five identified companies with sensitisation to the SDGs and national development goals, and with the monitoring, evaluation and impact assessment of their businesses' operations and production in relation to the SDG and National Development Strategy indicators; to promote SDG integration into the executives and managers' core business plans, strategies and investments; and to assist the UNCT with the selection of exemplary SDG-committed companies for celebrating.
- Under the overall guidance of the UNCT focal points, the Consultant will implement actions to support corporate philanthropic departments and foundations with the monitoring, evaluation and impact assessment of their interventions in relation to the SDG and National Development Strategy indicators; to promote the use of the SDGs' indicators as planning and impact assessment tools by philanthropists; and to assist the UNCT with the selection of exemplary SDG-committed philanthropists for celebrating.
- The Consultant will be responsible for formulating the work's methodology, preparing the project's deliverables, revising the deliverables to address the UNCT's criticisms, preparing materials and tools that are needed to fulfil the consultancy's objectives, conducting consultations with key stakeholders

in collaboration with the RCO, and integrating the UN Guiding Principles into the planning and execution of the assignment.

6. Deliverables

The contract is for 12 calendar months, with payment upon approval of submitted deliverables.

Activity	Deliverables	Duration	Timeline
a) Inception Report	To include a work plan, methodology (including the curriculum for business-leader SDG sensitisation, and the rubric for monitoring and evaluating business-based and philanthropic interventions, and determining their developmental impact), and timeline.	0.5 calendar months (10% of contract value)	December 2021
b) Mid-Assignment Report	To summarise the main results of the first half of the assignment (including annexed SDG-related, business-based and philanthropic accomplishments of the concerned companies, to the mid-point of the assignment), information on the executives, managers and philanthropists that have thus far been supported (e.g., contact details; business and philanthropic interests), draft versions of all assignment-related information products (e.g., sensitisation presentations; SDG monitoring and evaluation toolkits), and suggested amendments to the assignment with the potential to improve and accelerate its outcomes.	6.5 calendar months (40% of contract value)	December 2021-June 2022
c) End-of-Assignment Report	To summarise the entire assignment's main results (including annexed SDG-related accomplishments of the companies' core operations, production and philanthropy to the end of the works), recommendations (including the rankings that identify the two most accomplished companies, and the three most accomplished philanthropists, in terms of the SDGs and national development goals), relevant information (e.g., executives and managers' contact details and business and philanthropic interests), and final	5 calendar months	July 2022-November 2022

	versions of assignment-related information products (e.g., sensitisation presentations, SDG monitoring and evaluation toolkits) to enable similar works to be undertaken in the future.	(50% of contract value)	
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7. Qualification and Experience

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Education:

- A degree (Masters level or higher preferred) from an approved university in development studies, economics, social sciences, monitoring and evaluation, or any other related field.

Experience:

- A minimum of five years' experience in monitoring, evaluation and impact assessment of development related interventions (work with business- or philanthropy-based, development-related interventions would be an asset);
- Advanced facilitation skills and a proven record of convening meetings and training/sensitisation workshops (and creating associated information materials) involving senior members of the public, private, corporate philanthropy and/or international development sectors;
- Good contextual knowledge of TTO's private sector and its philanthropy (working relationships within the sector would be an advantage);
- Excellent knowledge of the SDGs, national development goals, and their indicators; and
- Strong interpersonal skills and the ability to communicate and work with diverse people.

8. Languages

Excellent analytical writing and oral presentation in English. Application procedure and documents to be submitted in English.

9. Proposal

Interested consultants must submit the following documents/information to demonstrate their qualifications on or before the suggested deadline online through the jobs.undp.org electronic portal.

- Technical Proposal** – This will explain why they are the most suitable for the work, providing a brief methodology on how they will approach and conduct the work, and highlighting their relevant work experience and skills for the assignment. The consultant's curriculum vitae, outlining detailed qualifications, experience and skills should be presented.
- Financial proposal** – This will include the fees and incidental costs considered inherent to the consulting.

The UNDP will enter into a contract based on a lump sum amount. The financial proposal shall represent a detailed, justified and "all inclusive" amount. In order to assist UNDP in the comparison of financial proposals, the financial proposal shall be explained as the total daily cost for the duration (maximum 48 days) of the consultancy period.

Proposals not meeting the above requirements will be rejected.

10. Evaluation Criteria

Method: Highest total score of weighted desk review and financial criteria: The price proposals of all consultants, who have attained a minimum 70% score at the Desk Review, will be compared. UNDP will award a contract to the individual who receives the highest score out of a predetermined weighted, Desk Review and Financial criteria as follows: 70% Desk Review criteria, 30% Financial criteria.

Selection Criteria		Maximum Points
1	A degree (Masters level or higher preferred) from an approved university in development studies, economics, social sciences, monitoring and evaluation, or any other related field.	15
2	A minimum five years' experience monitoring, evaluating and assessing the impact of development actions (work entailing business- or philanthropy-based, development-related approaches would be an asset) (1-2 years 10 points; 3- 4 years 15 points; 5 years and above 25 points)	25
3	Proven record of facilitating, convening and conducting meetings and sensitisation workshops (and creating associated information and training materials) with public, private and/or international-development sector leaders	25
4	Good contextual knowledge of TTO's private sector and its corporate philanthropy (working relationships within the sector would be an advantage)	15
5	Substantial professional application of the SDGs, the Vision 2030 National Development Strategy, and their indicators	15
6	Fluency in Written and Spoken English	5
TOTAL		100

Once the candidates have attained a score of at least 70% on the desk review, based on the requirements in the Terms of Reference, only then, their financial proposals to be evaluated.

The *final evaluation process* is based on a 70:30 weighting, with 30 points being allocated to the financial component.

The following formula (cumulative analysis) is used to determine the financial scoring: $p = y (\mu/z)$, where:

- p = points for the financial proposal being evaluated
- y = maximum number of points for the financial proposal
- μ = price of the lowest priced proposal

z = price of the proposal being evaluated

Additional requirements for recommended contractor:

The recommended Individual contractor below age 65 is required to submit a statement of good health and a copy of his/her medical insurance prior to commencement of services in any offices or premises of UN, or before engaging in any travel required by UN, or connected with the performance of the Contract. Medical examination not required.

The recommended Individual contractor aged 65 and older is required to submit a statement of good health signed by a recognized physician and a copy of his/her medical insurance prior to commencement of services in any offices or premises of UN, or before engaging in any travel required by UN, or connected with the performance of the Contract. The medical examination shall be paid by the consultant.