



Empowered lives.
Resilient nations.

TERMS OF REFERENCE

CONSULTANCY – DEVELOPMENT AND DELIVERY OF A SOCIAL PROTECTION TRAINING

A. JOB INFORMATION

Location:	Apia, Samoa
Application deadline:	18 March 2022
Type of Contract:	Professional Services Contract
Post Level:	International Consultancy
Languages required:	English
Duration of Contract:	Within 3 months with mid to end of April 2022 tentative start
Title:	RFP2022/WSM/01 Development and Delivery of a Social Protection Training – Samoa, Cook Islands, Niue, and Tokelau.

B. PROGRAM TITLE

Strengthening Resilience of Pacific Islands States through Universal Social Protection (also known as the ‘Social Protection Joint Program’).

C. BACKGROUND

Strengthening social protection systems in Samoa and other Pacific Island countries

The ‘Strengthening Resilience of Pacific Island States through Universal Social Protection (also called the Social Protection Joint Program) aimed to support four Pacific Island Countries and Territories (PICTs) (Samoa, Cook Islands, Tokelau, and Niue) in their efforts to strengthen their sustainable, inclusive, and evidence-based social protection systems. The Program is being implemented in the four PICTs from June 2020 to August 2022.

The four PICTs are among the most fragile Small Island Developing States (SIDS) due to their isolated geography, small economies and vulnerability (to climate change and external shocks). With limited economic opportunities, the quality of life for many of the local people have deteriorated with increased, poverty, social exclusion and inequality. An increased number of local people are facing economic hardships unable to meet basic needs. Urbanisation and monetisation are changing lifestyles and social dynamics, creating new forms of hardships, such as high living costs, lack of access to basic services, and decent employment opportunities. Increased non-communicable diseases, the emergence of communicable diseases, alcohol abuse and domestic violence are other key concerns for the health and well-being of Pacific Island people.

The UN Social Protection Joint Program (SP-JP) aims at increasing resilience through viable and financially sustainable SP systems that will address life cycle vulnerabilities, strengthen Social Protection (SP) floors, and enhance employability. The objective is to develop universal, evidence-based, nationally owned SP systems and introduce SP floors to help accelerate Sustainable Development Goals (SDG) progress through integrated programming and Leaving No One Behind. The Program is spearheaded by a Multi-Country Steering Committee (MCSC) and a Technical Committee for each of the four PICTs.

In line with the principles of the 2030 Agenda for Sustainable Development and outcomes of the UNDP Pacific Strategy 2018-2022, the SP-JP have adopted five strategic interventions in developing and strengthening coherent SP systems— data/evidence; inclusive participation and partnerships; sustainable finance; institutional coordination and capacity building; and outreach. The SP-JP has four outcomes: universal, inclusive & equitable SP systems; SP floors are efficiently and effectively administered; financial inclusion enables low transaction cost transfers of SP benefits; and increased resilience through mainstreaming of disability, gender, youth and climate-related contingencies.

Training on Social Protection

Existing social protection initiatives are fragmented and limited in scope, and the adoption and implementation of universal social protection systems are relatively novel in the four PICTs. As such, there is a great need to develop a better, well-informed, and common understanding of what is social protection (re principles, components/ingredients, schemes, programs, institutional and customization aspects, fiscal space, etc.), including what is required by the different PICTs based on their current social protection systems and contexts. There is scope provided under the SP-JP to help build and develop this understanding across the four PICTs, under the following activities of the approved SP-JP work plan:

- Train public servants to assess eligibility and address claims for redress.
- Training for Ministries of Finance, Women's Affairs and Social Services in evidence-based budgeting for SP (initial training and refresher training, 4 PICTs).
- Support efforts to build technical capacity for implementation of social protection with a focus on strengthening the understanding of stakeholders on key implementation aspects.

Given the novelty of the adoption, development and implementation of formal social protection systems (i.e. concepts, ideas, schemes, programs, etc.) in the PICTs, and especially in Samoa, the proposed social protection trainings will be broadened and expanded in its design and delivery to cover a whole range of topics and areas of social protection, while also incorporating contents that ensure contextualization of the trainings to respond to the training needs of participants across the four PICTs.

UNDP and UNESCAP (UN Economic and Social Commission for Asia and the Pacific) are collaborating on the design and delivery of the proposed social protection training. The proposed training is intended to include two components: (i) a short course on social protection; and (ii) training of trainers (ToT) - in support of future delivery of a short course on social protection. The learning objectives of the proposed training are stated as follows, which will be modified or deepened after the initial scoping and needs assessment:

1. To provide a theoretical grounding in social protection concepts and definitions, including an understanding of key policy instruments and approaches.
2. To equip participants with a shared set of tools and frameworks that support the design and applications of effective viable and financially sustainable SP systems.
3. To explore case studies and reflect on context-specific issues to help participants understand how systems can be developed and implemented in their territories.
4. To gain experience in being trained on the topic of social protection (ToT).
5. To equip ToT participants with online facilitation skills to deliver a social protection short course (ToT).
6. To build confidence in delivering social protection content and facilitating short course sessions (ToT).

This Terms of Reference (TOR) is developed to seek the assistance of a qualified and accredited training firm to work with UNDP and UNESCAP on the design and delivery of appropriate social protection training for selected participants from across the four PICTs.

D. SCOPE OF WORK

Objectives

The objectives of the consultancy are to:

- i). Conduct a scoping and needs assessment to further develop the training objectives; understand the audiences and identify appropriate teaching methods for both training components – short course on social protection; and training of trainers (ToT).
- ii). Design of a social protection training– consisting of (i) short course on social protection; and (ii) training of trainers (ToT).
- iii). Implement the approved social protection training – consisting of (i) short course on social protection; and (ii) training of trainers (ToT).
- iv). Provide monitoring, evaluation, and learning (MEL) as an integrated component of the social protection training, covering both the short course and ToT.

Tasks

To achieve the objectives, the Firm is expected to work closely with the UNDP (Governance & Poverty Reduction Unit (GPRU)) & UNESCAP focal point for SP-JP, and key focal members of the Technical Committees (across the four PICTs) in the provisions of technical assistance and support on the development and implementation of a social protection training. Targeted focus is needed on the following areas and processes to ensure the effective and efficient completion of the development and delivery of appropriate social protection training that will enhance the knowledge and skills of selected participants from the four PICTs.

i). Scoping and needs assessment

- Develop a scoping and needs assessment methodology and workplan (inception report) to further develop the training objectives; understand the audiences and identify appropriate teaching methods for both training components – short course on social protection; and training of trainers (ToT).
- Carry out the scoping and needs assessment.
- Present the scoping and needs assessment findings (a report) to the Technical Committees for inputs and endorsement.

ii). Design of a social protection training

- Based on the findings from the scoping and needs assessment, develop a social protection training – comprising of the short course on social protection, and training of trainers (ToT).
- Seek additional inputs (if necessary) from stakeholders across the four PICTs including consideration of existing evidence in the design of an appropriate social protection training – short course and ToT.
- Present the social protection training to the Technical Committees for inputs and endorsement.

iii). Implement the approved social protection training

- Liaise with UNDP, UNESCAP and participating organizations (with training participants) on the organizations and preparation of the delivery of the training - short course on social protection, and training of trainers (ToT).
- Continue to the launch of the training to ensure participants understand what is expected and what is required from the training - short course on social protection, and training of trainers (ToT).
- Conduct the training (short course and ToT) based on the approved social protection training and training work plan.
- Communicate with UNDP, UNESCAP and participating organizations (with training participants) on the conduct of the training to ensure its proper and smooth delivery, and address any issues that may impact the effectiveness, and ensure value-adding of the training to the participants.

iv). Provide monitoring, evaluation and learning (MEL)

- Develop an appropriate MEL (methodology/tool and process) for the training - short course on social protection, and training of trainers (ToT).
- Encourage and facilitate learning exchanges – e.g., south-south exchanges and other opportunities to further enhance participant knowledge, skills, and experiences in social protection development areas.
- Provide during and post-training evaluation (short course on social protection, and training of trainers (ToT)) to track the extent to which the training has increased knowledge and met learning objectives; to uncover and capture further capacity issues that might be addressed in future, and to reflect on lessons from the course and outlining potential options for continuing learning support.

- Prepare and submit a training report (for both short course on social protection, and training of trainers (ToT)) to UNDP, UNESCAP and TCs outlining what was developed, implemented, and achieved, including learnings, lessons learnt and areas for further support and improvement in future trainings.
- Present the MEL and training report findings (for both short courses on social protection, and training of trainers (ToT)) to the Technical Committees for inputs and endorsement.
- Participate in the closure of the training - including presentation of certificates for participants and a formal post-training evaluation (for both short courses on social protection, and training of trainers (ToT)) for participants and trainer to provide feedback on learning and areas requiring further and continuous support.

Expected outputs and deliverables

In line with the scope of work outlined above, the Firm will work closely with UNDP GPRU, UNESCAP focal point for SP-JP, and key focal members of the Technical Committees (across the four PICTs), to ensure the effective and efficient completion and submission of the following outputs and deliverables within the specified timelines specified in Table 1 below:

Table 1: Outputs, deliverables and timelines

Outputs	Deliverables	Tentative Due Date
1. Design and implementation of a scoping and needs assessment	• Inception Report stating methodology and workplan.	22 April 2022
	• Scoping and needs assessment report developed, presented, and endorsed.	29 April 2022
2. Design of a social protection training	<ul style="list-style-type: none"> • Social protection training designed, presented and endorsed. • MEL methodology developed and included as part of the design of the SP training. 	6 May 2022
3. Implementation/ delivery of training	• 2 Training Sessions of 20 – 30 participants delivered and completed, with regular weekly debriefings with UNDP and UNESCAP on how the training is progressing.	10 June 2022
4. Monitoring, evaluation, and learning (MEL)	<ul style="list-style-type: none"> • Training evaluation. • Training report developed, presented, and endorsed. 	24 June 2022
Total		

Timeframe of the consultancy

This consultancy is expected to commence in April 2022 and to complete by July 2022. The Firm is expected to work closely with UNDP, UNESCAP and Technical Committees (Samoa, Cook Islands, Niue, and Tokelau) to ensure completion of the tasks and deliverables and to meet the objectives outlined in this TOR.

Payment Schedule

The Firm will be remunerated by the effective completion and submission of the required deliverables within the required timelines in Table 1. The payment schedule will be processed by the payment schedule given in Table 2:

Table 2: Payment schedule

Deliverables	Tentative Due Date	Amount (USD) to be paid upon UNDP Certification of Deliverable Satisfactory Performance
i). Inception Report (maximum 10 pages)	22 April 2022	10% of the contract price

ii). Scoping and needs assessment report developed, presented, and endorsed.	29 April 2022	20% of the contract price
iii). Social protection training designed, presented, and endorsed. - MEL methodology developed and included as part of the design of the SP training under Output 2 above.	6 May 2022	25% of the contract price
iv). Training delivered and completed, with regular debriefings with UNDP and UNESCAP on how the training is progressing.	10 June 2022	35% of the contract price
v). Training evaluation and training report developed, presented, and endorsed.	24 June 2022	10% of the contract price
Total		Total Amount – 100%

E. INSTITUTIONAL ARRANGEMENTS

With backstopping and quality assurance from the UNDP and UNESCAP offices, and guidance of the Social Protection Technical Committees, the Firm is expected to complete and submit the required deliverables within the specified timeframes.

Counterparts and line of reporting

The Firm will work directly with the UNDP Assistant Resident Representative (ARR) GPRU, UNDP Social Protection Chief Technical Adviser, UNDP SP Project Coordinator, UNESCAP focal points, Technical Committees, and other focal points in the other UN Participating Organizations and Governments of the four PICTs.

Inputs by stakeholders, UN agencies and other development partners

All key stakeholders, UN agencies and other development partners will make available to the firm all relevant information that may assist the firm in carrying out and completing the Terms of Reference.

Duty station

Due to COVID19 Travel Restrictions, the Firm will be home-based but virtual participation in all aspects of the assignment is required.

F. QUALIFICATION OF THE SUCCESSFUL FIRM

- Past experiences in the development and delivery of social protection training in developing countries.
- A Proven track record of experiences in undertaking social protection development work including training and development for social protection policymaking and implementing agencies.
- The Firm is an accredited certified trainer with a proven track record of providing global/internationally accredited training in social protection, with the ability to customize to different participant learning contexts and needs.
- Substantial experiences in research with an academic contribution to knowledge building in the social protection areas including poverty reduction, social development, and other related development areas.
- Relevant work experience in the Pacific Islands is a strong advantage.

G. COMPETENCIES OF THE REQUIRED KEY PERSONNEL

Qualifications and Experiences:

Team Leader:

- Minimum Master's degree in Social Development, Political Science, Sociology, Economics, Law, Public Administration, Social Policy, Statistics and/or related social sciences.
- At least 15 years of work experience as a trainer in social protection.
- At least 10 years of work experience at the international level in Social Protection, Social Development, Sociology, Poverty reduction, and other related development areas at theoretical and practical levels in the field.

Minimum Team members of four (4) personnel including the Team Leader, collectively, shall have the following experience and expertise:

- Proven experience in providing social protection training.
- Proven track record of experience in designing and delivering training in social protection.
- Substantial experience in research and with scholarship contributions to the development areas of social protection, including related areas such as poverty reduction, social development, and others.
- Relevant work experience in the Pacific Islands is a strong advantage.
- Relevant work experience in developing countries in a multi-stakeholder environment with a development organization, Government, civil society, private sector, or a research/academic institution.
- Sound understanding of project results-based management would be an asset.
- Proficiency in written and spoken English required.

Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience	300
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	300
	Total	1000

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	The reputation of Organization and Staff Credibility / Reliability / Industry Standing	20
1.2	General Organizational Capability which is likely to affect implementation: <ul style="list-style-type: none"> a. A Proven track record of experiences in undertaking social protection development work including training and development for social protection policymaking and implementing agencies (50 points) <ul style="list-style-type: none"> • 50- Extensive experiences (15 yrs) as mentioned above • 35- Decent level of experiences (10 yrs) as mentioned above • 20- Limited experiences (5 yrs) as mentioned above b. The Firm is a certified trainer with a proven track record of providing global/internationally accredited training in social protection, with the ability to customize to different participant learning contexts and needs (30 points) <ul style="list-style-type: none"> • 30- Certified with a proven track record of providing such training • 21- Certified with Limited track record of providing such training • 15- Not Certified but proven track record of providing such training • 10- Not Certified and limited track record of providing such training c. Substantial experiences in research with an academic contribution to knowledge building in the social protection areas including poverty reduction, social development, and other related development areas (40 points) <ul style="list-style-type: none"> • 40 - Extensive experiences (15 yrs) as mentioned above 	120

	<ul style="list-style-type: none"> • 35 - Decent level of experiences (10 yrs) as mentioned above • 20 - Limited experiences (5 yrs) as mentioned above 	
1.3	<p>Relevance of specialized knowledge and experience on similar engagements done in the region/country</p> <p>a. Past experiences in the development and delivery of social protection training in developing countries (50 points)</p> <ul style="list-style-type: none"> • 50 – Extensive past experiences (15 yrs) in the development and delivery of social protection training in developing countries • 35 – Decent level of past experiences (10 yrs) in the development and delivery of social protection training in developing countries • 20 – Limited level of past experiences (5 yrs) in the development and delivery of social protection training in developing countries <p>b. Relevant work experience in the Pacific Islands is a strong advantage (20 points)</p>	70
1.4	<p>Quality assurance procedures and risk mitigation measures</p> <ul style="list-style-type: none"> • 60- Requirements submitted and supported by good evidence of ability to support and exceed contract requirements • 35- Requirements submitted and supported by marginally acceptable or weak evidence of ability to support and exceed contract requirements • 15 – Requirements submitted but not supported by evidence to demonstrate ability to comply with contract requirements • 0 – Information has not been submitted or is unacceptable 	60
1.5	<p>Organizational Commitment to Sustainability (mandatory weight)</p> <ul style="list-style-type: none"> • 20 - The organization is compliant with ISO 14001 or ISO 14064 or equivalent • 5 - The organization is a member of the UN Global Compact • 5 --Organization demonstrates a significant commitment to sustainability through some other means - for example, internal company policy documents on women empowerment, renewable energies or membership of trade institutions promoting such issues 	30
Total Section 1		300

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	80
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	100
2.3	Details on how the different service elements shall be organized, controlled and delivered	50
2.4	Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement	50
2.5	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	70
2.6	Demonstration of ability to plan, integrate and effectively implement sustainability measures in the execution of the contract	50
Total Section 2		400

Section 3. Management Structure and Key Personnel			Points obtainable
3.1	The composition and structure of the team were proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?		60
3.2	Qualifications of key personnel proposed		
3.2 a	Team Leader / Needs Assessment Specialist		120

	<ul style="list-style-type: none"> Minimum Master's degree in Social Development, Political Science, Sociology, Economics, Law, Public Administration, Social Policy, Statistics and/or related social sciences. 	30	
	<ul style="list-style-type: none"> At least 15 years of work experience as a trainer in social protection. 	50	
	<ul style="list-style-type: none"> At least 10 years of work experience at the international level in Social Protection, Social Development, Sociology, Poverty reduction, and other related development areas at theoretical and practical levels in the field. 	30	
	<ul style="list-style-type: none"> Proficiency in written and spoken English required. 	10	
3.2 b	Team Members		110
	Facilitator / Trainer		
	<ul style="list-style-type: none"> Minimum Master's degree in Social Development, Political Science, Sociology, Economics, Law, Public Administration, Social Policy, Statistics and/or related social sciences. 	15	
	<ul style="list-style-type: none"> At least 10 years of work experience as a trainer in social protection 	40	
	<ul style="list-style-type: none"> At least 7 years of work experience at the international level in Social Protection, Social Development, Sociology, Poverty reduction, and other related development areas at theoretical and practical levels in the field 	30	
	<ul style="list-style-type: none"> Proficiency in written and spoken English required 	15	
3.2 c	Trainer / Needs Assessment Support		110
	<ul style="list-style-type: none"> Minimum Master's degree in Social Development, Political Science, Sociology, Economics, Law, Public Administration, Social Policy, Statistics and/or related social sciences. 	15	
	<ul style="list-style-type: none"> At least 10 years of work experience as a trainer in social protection 	40	
	<ul style="list-style-type: none"> At least 7 years of work experience at the international level in Social Protection, Social Development, Sociology, Poverty reduction, and other related development areas at theoretical and practical levels in the field 	30	
	<ul style="list-style-type: none"> Proficiency in written and spoken English required 	15	
3.2 d	Trainer		100
	<ul style="list-style-type: none"> Minimum Master's degree in Social Development, Political Science, Sociology, Economics, Law, Public Administration, Social Policy, Statistics and/or related social sciences. 	15	
	<ul style="list-style-type: none"> At least 7 years of work experience as a trainer in social protection 	40	
	<ul style="list-style-type: none"> At least 7 years of work experience at the international level in Social Protection, Social Development, Sociology, Poverty reduction, and other related development areas at theoretical and practical levels in the field 	30	
	<ul style="list-style-type: none"> Proficiency in written and spoken English required 	15	
Total Section 3			500