



TERMS OF REFERENCE FOR

International Consultant (IC) to Review & Update the Ministry of Finance Sector Planning Manual 2015

A. PROJECT TITLE

SDG Financing Component 1 Joint Programme - *“Sustainable Financing for the 2030 Agenda through viable Integrated National Financing Frameworks in Cook Islands, Niue, and Samoa”*

B. PROJECT DESCRIPTION

1. Introduction and Background

The 17 SDGs adopted by all UN member states in 2015 represent an integrated action plan to bring an end to poverty, fight inequalities and reduce climate change impacts while leaving no one behind, by 2030. Financing the 2030 Agenda for Sustainable Development, however, remains a challenge. There is a large funding gap for SDGs at the global and regional level, and this gap continues to widen at the national level. Hence, most governments cannot fund their SDG priorities with public capital and Official Development Assistance (ODA) alone.

Access to financial flows and services plays a critical role in the implementation and achievement of the SDGs 2030. The Addis Ababa Action Agenda (AAAA) therefore calls for countries to establish Integrated National Financing Frameworks (INFFs) to support the implementation of the 2030 Agenda. Many countries in the Pacific have already aligned their National Development Plans and Strategies to the SDGs. The challenge is to ensure that these plans and strategies are supported by a financing strategy, which articulates how these aspirations would be financed. Most Pacific Island countries do not have financing strategies in place.

The effects of recent global developments and shocks such as the COVID19 pandemic have dealt a severe blow to the world economy leading many countries to economic crisis and recession since March 2020. It set the economic and social development back for many countries jeopardizing the progress made to livelihoods and sustainable development over the past years. There is an urgent need to push for policy action to enable strong and sustainable growth, protecting the vulnerable and improving resilience to cope with shocks to the system. In addition, the financial flows required to move the Sustainable Development Agenda forward are also at risk of contracting.

In June 2020, Samoa's Joint SDG Fund proposal for Component 1 was approved to provide support to the Cook Islands, Niue, and Samoa to enable and strengthen existing policies and institutional structures for the development and operationalizing of integrated financing framework and strategies such as the reviewing and development of DFAs, the alignment of national planning frameworks and strategic plans to the national budget and available financing mechanisms, and to strengthen public-private engagement to stimulate the mobilization of resources to support National Development plans and the acceleration of Sustainable Development Goals.

To enable the alignment of national planning frameworks and strategic plans to the national budget, UNDP is seeking an International Consultant to support the Government of Samoa through the Ministry Finance in reviewing and updating the National Sector Planning Manual (SPM) 2015. The SPM 2015 is a revision of the SPM 2009 that has been widely used by the 14 Sectors of the Economy to guide the development of Sector Plans.

With the majority of Development Sectors having reviewed and developed their sector plans using the current SPM, there have been lessons learned and areas identified in which sector planning can be improved. With the launching of the new national plan “The Pathway for the Development of Samoa (PDS) FY2021/22-FY2025/26”, therefore further emphasizes the need for clear alignment and coherency across the national planning framework. Ultimately, the ever-evolving landscape of development planning calls for more robust guidelines and comprehensive frameworks that will produce effective, inclusive, and well-informed plans.

C. SCOPE OF WORK

Under the direct supervision of the Assistant Resident Representative (ARR) GPRU, with Quality Assurance support from the UNDP GPRU and the SDG Financing Regional Team at BRH Office; The International Consultant is expected to undertake the following roles in support of the Ministry of Finance.

- i) Review relevant documents including the SPM 2015, Samoa Monitoring Evaluation and Reporting Framework (SMERF) Manual, PDS, and all available Sector Plans and review reports.
- ii) Review and recommend alignment and consistency where appropriate amongst the abovementioned planning documents.
- iii) Provide technical assistance in the use and streamlining of planning frameworks (e.g.) M&E, costing and resourcing (MTEF), risk management, etc. that will be included in the updated SPM.
- iv) Provide support to EPPD in preparing for and facilitating stakeholder consultations.
- v) Provide a review report of the key discussion points, findings, and issues resulting from stakeholder consultations.
- vi) Provide the updated draft of the Sector Planning Manual for relevant validation and endorsement processes.

D. EXPECTED OUTPUTS AND DELIVERABLES

The selected International Consultant will work under the technical guidance from the Ministry of Finance, particularly the Economic Policy & Planning Division (EPPD), with technical backstopping and quality assurance from the UNDP GPRU and the UNDP Bangkok Regional Hub, to ensure the effective and timely delivery and submission of the following deliverables within the specified timelines.

OUTPUTS	DELIVERABLES	TARGET DUE DATES
1. Comprehensive Workplan including Timeline & Detailed Methodology and Outputs of the Assignments	Inception Report	27 th May 2022
2. Conduct extensive Stakeholder Consultations and provide review report of key issues and findings	Consultation Findings & Draft Review Report	01 st July 2022
3. Present Review Report Findings to Sector Validation Stakeholders for Validation	Final Review Report	22 nd July 2022
4. First Draft of Updated Sector Planning Manual.	Draft Updated Sector Planning Manual	05 th August 2022
5. Final Draft of Sector Planning Manual	Final Updated Sector	

incorporating comments received from Stakeholders and MOF	Planning Manual	19 th August 2022
6. Present exit Report detailing achievements, challenges, and recommendations for next steps.	Assignment Exit Report	26 th August 2022

E. INSTITUTIONAL ARRANGEMENT

Under the direct supervision of the ARR-GPRU with the technical of Economic Planning & Policy Division of the Ministry of Finance, and quality assurance from the UNDP-GPRU and BRH Office, the international consultant is expected to deliver the expected deliverables within the required timeframes.

The IC is also expected to engage and work with a range of relevant stakeholders such as Government Ministries/Agencies, Private Sector Entities, Civil Society Organizations, and Development Partners

The consultant shall be equipped with an adequately functioning personal laptop/computer and mobile phone, along with reliable Internet connection, for this assignment

F. DURATION OF WORK

The duration of the assignment is approximately 60 working days and is expected to be completed within 12 Weeks period and by **31st August 2022**

G. DUTY STATION

The Consultant will be home based, but virtual participation is highly required in every part of the assignment.

H. QUALIFICATIONS AND EXPERIENCE OF THE SUCCESSFUL CONTRACTOR (SHOWING ASSESSMENT VALUE)

Education

- ❖ Master's in economics, Public Policy, or other related fields

Experiences

- ❖ Minimum ten (10) years of practical work experience in strategic development planning, public policy, and resource allocation and budgeting.
- ❖ Significant knowledge and expertise in development planning and policy formulation.
- ❖ Excellent and demonstrable experience in monitoring and evaluation, medium term financing, and risk management.
- ❖ Demonstrated knowledge of cross-cutting issues and relevant regional and international policy and planning landscapes.
- ❖ Experience in Asia-Pacific Region will be considered a significant asset

I. SCOPE OF PRICE PROPOSAL AND SCHEDULE OF PAYMENTS

OUTPUTS	DELIVERABLES	Percentage (USD) to be paid UNDP Certification of Deliverable and Satisfactory Performance
1. Comprehensive Workplan including Timeline & Detailed Methodology and Outputs of the Assignments	Inception Report	10%
2. Conduct extensive Stakeholder Consultations and provide review report of key issues and findings	Consultation Findings & Draft Review Report	20%
3. Present Review Report Findings to Sector Validation Stakeholders for Validation	Final Review Report	20%
4. First Draft of Updated Sector Planning Manual.	Draft Updated Sector Planning Manual	20%
5. Final Draft of Sector Planning Manual incorporating comments received from Stakeholders and MOF	Final Updated Sector Planning Manual	20%
6. Present exit Report detailing achievements, challenges, and recommendations for next steps.	Assignment Exit Report	10%

The financial proposal shall specify an ALL-INCLUSIVE LUMP SUM amount that is inclusive of all foreseeable expenses to carry out the assignment, and that the contract price is fixed regardless of any changes in the cost components. In order to assist the requesting unit in the comparison of financial proposals, a detailed cost breakdown must be provided in the format of the Financial Proposal Template.

J. RECOMMENDED PRESENTATION OF PROPOSAL

Interested offerors must submit ALL the following documents/ information to demonstrate their qualifications in one single PDF document:

- Technical Proposal (Approach, Methodology & Workplan)
- All-inclusive Financial Proposal
- Completed and signed Confirmation of Interest and Availability, including breakdown of costs supporting the all-inclusive Financial Proposal (using the template provided by UNDP in Annex II)
- P-11 form or CV, indicating education details, past relevant experience, contact details (email and telephone number) and at least three (3) professional references (most recent)

Incomplete proposals will NOT be considered. They will be disqualified automatically

Kindly note you can upload only ONE document to this application (scan all documents in one single PDF file to attach).

Annexes:

Annex 1: UNDP General Terms and Conditions for the Services of Individual Contractors

Annex 2: Offeror's Letter confirming interest and availability for the assignment, including breakdown of costs supporting the all-inclusive financial proposal

Annex 3: P-11 form

Queries about the consultancy can be directed to procurement.ws@undp.org.

All proposals should be submitted through the UNDP job-site. Email submission proposals will not be accepted.

J. CRITERIA FOR SELECTION OF BEST OFFER

The award of the contract shall be made to the individual consultant whose offer has been evaluated and determined as;

- ❖ Responsive/ Compliant/ Acceptable, and,
- ❖ 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% of the total technical points (49points) will be considered for the Financial Evaluation. Interviews may be conducted as part of the technical assessment for shortlisted proposals.

Technical Proposals (70%)

Technical Approach & Methodology (30 marks)

- ❖ This explains the understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. The Applicant should also explain the methodologies proposed to adopt, highlight the compatibility of those methodologies with the proposed approach, and provide an indicative Workplan and total budget.
- ❖ The candidate is required to provide the breakdown of cost by deliverables as reflected in section D

Qualification and Experience (40 marks) – Evaluation of CVs for Shortlisting

- ❖ Education (10 marks)
- ❖ Minimum ten (10) years of practical work experience in strategic development planning, public policy, and resource allocation and budgeting. (10 marks)
- ❖ Significant knowledge and expertise in development planning and policy formulation. (7 marks)
- ❖ Excellent and demonstrable experience in monitoring and evaluation, medium term financing, and risk management. (5 marks)
- ❖ Demonstrated knowledge of cross-cutting issues and relevant regional and international policy and planning landscapes. (5 marks)
- ❖ Experience in Asia-Pacific Region will be considered a significant asset (3 Marks)

Financial Proposal (30%)

- ❖ Financial proposal that indicates the all-inclusive fixed total contract price in United States Dollars (including professional fee and all other related and applicable costs to be incurred by the individual consultant in completing the assignment), supported by a breakdown of costs, as per template provided (Annex II)

Awarding of Contract

The combined scoring method which will be based on a combination of the technical and financial score to award the contract:

Rating the Technical Proposal (TP):

TP Rating = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100

Rating the Financial Proposal (FP):

FP Rating = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100

Total Combined Score:

Combined Score = (TP Rating) x (Weight of TP, 70%) + (FP Rating) x (Weight of FP, 30%)

NOTE: In the event of unforeseeable travel not anticipated in this TOR, payment of travel costs including tickets, lodging, and terminal expenses should be agreed upon, between UNDP and the Individual Consultant, before travel and will be reimbursed.

APPROVAL

This TOR is approved by

Signature:

Name and Designation: Christina Mualia-Lima (UNDP ARR - Governance & Poverty Reduction Unit)

Date of Signing:

