

REQUEST FOR EXPRESSIONS OF INTEREST (CONSULTING SERVICES – FIRMS SELECTION)

COUNTRY – Trinidad and Tobago

OECS Regional Health Project

Loan No. IDA-D5120

Project No.: P168539

Assignment Title: Consultancy to Review and Update CARPHA's
Monitoring and Evaluation Basic and Advanced Monitoring and
Evaluation Manuals

Reference No. TT-CARPHA-213507-CS-CQS

The Caribbean Public Health Agency (CARPHA) has received financing from the World Bank toward the cost of the OECS Regional Health Project and intends to apply part of the proceeds for consulting services.

The consulting services (“the Services”) include:

To further improve and strengthen M&E practice in the Caribbean Region to enable more effective evidence based public health interventions, programmes and policies. The services are expected to take five (5) months to complete and are scheduled for the year 2021.

The detailed Terms of Reference (TOR) for the assignment is attached to this request for expressions of interest. (See Annex A)

The Caribbean Public Health Agency (CARPHA) now invites eligible consulting firms (“Consultants”) to indicate their interest in providing the Services. Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services. The shortlisting criteria are:

- Interested firms must provide experience of having completed at least three (3) contracts similar in scope and nature with sufficient description (including location/country, name of the Employer/Client, type of services provided, period of contract, contract amount, starting and completion dates).
- Availability of appropriate skills/expertise among the consultant's staff to demonstrate technical capability of the firm. The following experts are required for the assignment: Team Leader; Instructional Design Expert; and a Monitoring and Evaluation Expert. The general qualifications, Experience requirements of key staff are provided in the Terms of Reference. Key Experts will not be evaluated at the shortlisting stage.

- The consulting firm shall be legally registered by the regulatory authorities and the following documents shall be submitted;

(i) A certificate of incorporation/registration for the firm.

The attention of interested Consultants is drawn to Section III, paragraphs, 3.14, 3.16, and 3.17 of the World Bank's "Procurement Regulations for IPF Borrowers" July 2016 ("Procurement Regulations"), setting forth the World Bank's policy on conflict of interest. In addition, please refer to the following specific information on conflict of interest related to this assignment (i.e., *3.17 of the Procurement Regulations*).

Consultants may associate with other firms to enhance their qualifications but should indicate clearly whether the association is in the form of a joint venture and/or a sub-consultancy. In the case of a joint venture, all the partners in the joint venture shall be jointly and severally liable for the entire contract, if selected.

A Consultant will be selected in accordance with the **Consultant Qualification Selection method (CQS)** set out in Procurement Regulation.

Further information can be obtained at the address below during office hours 8:00am to 4:00pm Mondays to Fridays. Expressions of interest must be delivered in a written form to the address below by e-mail by 4th June 2021.

Caribbean Public Health Agency
Kern Cassell – Procurement Officer
16-18 Jamaica Boulevard, Federation Park
Port-of-Spain, Trinidad and Tobago
Tel: 1-868-622-4261
Fax: 1-868-622-2792
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TERMS OF REFERENCE

Activity 2.1.2.2.1.

Consultancy to Review and Update CARPHA's

Monitoring and Evaluation Basic and Advanced Monitoring and Evaluation Manuals

1. Background

The Caribbean Public Health Agency (CARPHA) is the sole regional public health agency for the Caribbean and is the principal regional institution charged with the provision of strategic direction in analyzing, defining and responding to public health priorities of the Caribbean Community. A key function of CARPHA is to monitor global agreements and developments that may have an impact on public health and to monitor and report on measures to attain the approved objectives of the Caribbean Cooperation in Health.

Public health surveillance is one of CARPHA's core mandates (IGA, Article 5) and the mainstay of the work of CARPHA. The region faces a complex mosaic of diseases and public health conditions. In this regard, CARPHA's public health surveillance work is multifaceted, addressing a wide spectrum of diseases and public health issues in the region (i.e., infectious, chronic, environmental).

Starting in 2002, the Caribbean Health Research Council (CHRC) was integrally involved in HIV/AIDS monitoring and evaluation training and technical assistance. All M&E activities performed formerly by CHRC continue to be delivered by CARPHA. Since the establishment of CARPHA, there has been an increasing need to expand the M&E services beyond HIV/AIDS to focus on M&E systems strengthening in the Health sector.

Over the past decade, health professionals and members of civil society from over 20 Caribbean countries have benefited from several M&E training and workshops aimed at strengthening national health systems through M&E capacity building throughout the Caribbean. In 2019, CARPHA gained accreditation of the Basic and Advanced M&E Training covering the period of 2019–2022 by the Agency for Public Health Education Accreditation. CARPHA recognizes the need to explore and apply new innovations and technologies to

further improve and strengthen M&E practice in the Caribbean region to enable more effective evidence based public health interventions, programmes and policies in a resource constrained environment.

Approved in 2019, [the Organisation of Eastern Caribbean States \(OECS\) Regional Health Project](#) (RHP), is a five (5) year project funded by the World Bank. The overall objective of the project is to (i) improve preparedness capacities of health systems for public health emergencies in the OECS region, and (ii) provide a response in the event of eligible crises or emergencies. The OECS RHP is implemented by four CARPHA member states (Dominica, Grenada, Saint Lucia and Saint Vincent and the Grenadines), CARPHA and the OECS Commission.

The areas of focus revolve around improving International Health Regulations (IHR) core capacities in the areas of surveillance, laboratories, workforce development and emergency management. There are four Components under this project; (i) Improved Health Facilities and Laboratory Capacity, (ii) Public Health Surveillance, Preparedness and Response (iii) Institutional Capacity Building, Project Management and Coordination, and the Contingency Emergency Response Component (CERC) implemented at country level.

As part of CARPHA's mandates, the Agency will serve as the Caribbean Reference Laboratory, coordinate regional public health surveillance, provide support to countries in surveillance and disease control, conduct specialized training for health workers, and define quality standards and standard operating procedures. Under this project, CARPHA will coordinate and facilitate the execution of activities that are in alignment with the objectives.

The project activities under Component 2 support efforts to strengthen public health preparedness, including surveillance and emergency response through improvement of national and regional capacities and promotion of cross border collaboration. Component

2 is further segregated into Sub Components 2.1 – Public Health Surveillance and 2.2 – Emergency Management. This consultancy is concerned with Component 2, under sub component 2.1 – Public Health Surveillance at the national and regional level.

2. Objectives of the Assignment

The **overall objective** of the Assignment is to contribute to the strengthening of public health surveillance in the Caribbean.

The **specific objective** of the assignment is to further improve and strengthen M&E practice in the Caribbean Region to enable more effective evidence based public health interventions, programmes and policies.

3. Scope of Services, Tasks (Components) and Expected Deliverables

Under the direct supervision of the Monitoring and Evaluation Specialist, the Firm will be expected to execute the tasks and activities under each of the following Results:

Result 1: Inception Report, including a detailed Workplan, developed and submitted for the approval of the Project Manager

- 1.1. Engage in an initial briefing with the M&E Specialist and other relevant staff of CARPHA to discuss the scope of work to be undertaken, the approach and any other issues pertaining to the Project upon the commencement of the Consultancy.
- 1.2. Discuss and agree on the approach and the methodology for the M&E Training Needs Assessment to be conducted. Should the approach entail the conduct of a basic survey of stakeholders in CARPHA Member States, provide the Project Manager with the indicative list of survey questions

- 1.3. Prepare and submit for the approval of the Project Manager, an Inception Report which includes a detailed Workplan with the timelines for the specific project activities and the methodology for the activities

Result 2: M&E Training Needs Assessment conducted

- 2.1. Review CARPHA's existing M&E Training Strategy and two (2) M&E manuals, namely the Basic M&E Manual and the Advanced M&E Manual
- 2.2. Finalisation and confirmation of the evaluation protocols for the M&E Training Needs Assessment following review of CARPHA M&E Training Strategy and M&E Manuals
- 2.3. Conduct of the M&E Training Needs Assessment with stakeholders across CMS (this may be done virtually – to be confirmed as travel restrictions permit)
- 2.4. Prepare an Interim Progress Report which will include the findings of the Needs Assessment

Result 3: Updated versions of Basic and Advanced M&E Manuals, inclusive of the creation of new areas, developed and submitted for the approval of the Project Manager

- 3.1. Using the findings of the M&E Training Needs Assessment and following consultation with the M&E Specialist, update CARPHA's Basic and Advanced M&E Training Manuals. The Consultant will incorporate new developments, innovations and technologies in M&E into the revised M&E training manuals as well as proposals for new areas towards public health programmes and surveillance
- 3.2. At least one (1) meeting to be conducted two (2) weeks after the submission of each deliverable throughout the consultancy (virtual) with the Monitoring and Evaluation Specialist, and other relevant CARPHA personnel, to review the submission and applicability of new knowledge in order to strengthen institutional capacity by using

- a learning-by-doing approach as part of developing the training manuals, materials and tools. The Consultants will also be required to incorporate feedback and comments from CARPHA personnel into the respective deliverables.
- 3.3. Develop modular training manuals for workshops that target public health professionals in CMS – one modular training manual to supplement the Basic M&E Manual, and one modular training manual to supplement the Advanced M&E Manual. The modular training manuals will include: PowerPoint Presentations; Group work and interactive materials including case studies; Facilitator notes; Handouts; Identification of further readings/references; Any other supporting materials identified as necessary for achievement of the training objectives
- 3.4. Present Draft Manuals to the M&E Specialist, the OECS RHP Regional Project Advisory Committee and other relevant staff at CARPHA
- 3.5. Prepare and submit Interim Progress Report for the approval of the M&E Specialist. The following documents shall be set out as Annexes to this Interim Report: M&E Training Needs Assessment Report; Revised/Updated Basic M&E Manual and Modular Training Manual; Advanced M&E Manual and Modular Training Manual; Summary of comments/observations/suggestions for amendment made by M&E Specialist and other CARPHA personnel following the presentation of the Manuals by the Consultant.

Result 4: Draft Final Report developed and submitted for the approval of the Project Manager

- 4.1. Incorporate comments made by the M&E Specialist, other relevant CARPHA personnel, and other key stakeholders into Draft Final versions of the updated manuals and modular training manuals.
- 4.2. Prepare a Draft Final Report of maximum 20 pages (main text, excluding annexes) to be submitted no later than one month before the end of the period of

implementation of tasks. The submission must be a comprehensive report comprising the work conducted the challenges encountered, and actions taken to address challenges. The revised versions of the Basic and Advanced M&E Manuals should be included as annexes to the Draft Final Report. The manuals developed will be incorporated to facilitate M&E Training by CARPHA with other Ministries (Dominica, St. Lucia, Grenada and St. Vincent).

Result 5: Final Report developed and submitted

5.1. Prepare and submit a Final Report with the same specifications as the draft final report, incorporating any comments received from the parties on the draft report. The deadline for sending the final report is seven days after receipt of comments on the draft final report.

An indicative implementation timetable is provided below in Table 1 below:

Table 1 : Indicative Timetable of Implementation						
Results/Activities	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Result 1: Inception Report	Wk. 2					
Result 2: M&E Training Needs Assessment conducted			Wk4			
Result 3: Updated versions, inclusive of new modules created in the Basic, (and Intermediate) and Advanced M&E Manuals				Wk4		

developed						
Result 4: Draft Final Report					Wk4	
Result 5: Final Report						Wk2

Confidentiality, Copyright and other Proprietary rights

1. The Firm shall maintain full confidentiality of all documentation shared and produced during the consultancy. The consultant may not utilize, without prior approval from CARPHA, the information for presentations or studies related to this consultancy
2. CARPHA shall be entitled to all copyrights, patents and other proprietary rights and trademarks with regard to the products or documents and other materials which bear a direct relation to, or are produced or prepared or collected in consequences of, or in the course of the execution of the consultancy.

1. Qualification Requirements for the Key Experts

Key Expert: Team Leader

Qualification Requirements for the Key Expert

Academic Qualifications

- At least a PhD from an accredited university in Public Health, Monitoring and Assessment, International Development, or a related field.

Specific Experience

- At least ten (10) years of experience in developing a training program, training manuals and the delivery of training to adult learners using best practices.
- At least ten (10) years' experience in training needs assessment, capacity development assessment and development

General Experience

- At least ten (10) years of relevant working experience in monitoring and evaluation to support health systems strengthening, monitoring and evaluation of international development projects or other related experience.

Languages

- Excellent knowledge of English – written and spoken

Other Requirements

- A sound understanding of public health issues along with the cultural and political challenges faced by Caribbean territories as demonstrated by involvement in projects treating with public health issues.
- A strong understanding of the role of monitoring and evaluation to support health systems strengthening.
- Experience working with Caribbean countries will be an asset.

Key Expert: Instructional Design Expert**Qualification Requirements for the Key Expert****Academic Qualifications**

- At least a Master's in Instructional Design or Educational Technology, or a related field, from an accredited university

Specific Experience

- Working knowledge of subject pedagogy, andragogy, curriculum design and curriculum development
- Working knowledge of Competency-Based Curriculum design
- Knowledge of implementation of curriculum

General Experience

- At least three (3) years' experience in curriculum design, development, and implementation
- At least two (2) years' experience in developing and managing the development of competency-based curricula.
- At least two (2) years' experience in training delivery

Languages

- Excellent knowledge of English – written and spoken.

Other requirements:

- A sound understanding of public health issues along with the cultural and political challenges faced by Caribbean territories as demonstrated by involvement in projects treating with public health issues.
- A strong understanding of the role of monitoring and evaluation to support health systems strengthening.
- Experience working with Caribbean countries will be an asset.

Key Expert: Monitoring and Evaluation Expert

Qualification Requirements for the Key Expert

Academic Qualifications

- At least a Master's in Monitoring and Evaluation, Statistics, Development Studies, Social Science, or a related field, from an accredited university

Specific Experience

- Broad experience in the design and implementation of capacity building activities in monitoring and evaluation.
- Demonstrated capacity in the monitoring and evaluation systems design and implementation.
- Experience in designing tools and strategies for data collection, analysis, and production of reports.
- Knowledge of quantitative and qualitative monitoring methodologies and proven ability to design monitoring instrumentation tools.

General Experience

- At least seven (7) years of relevant working experience in monitoring and evaluation to support health systems strengthening, monitoring and evaluation of international development projects or other related experience.

Languages

- Excellent knowledge of English – written and spoken.

Other requirements:

- A sound understanding of public health issues along with the cultural and political challenges faced by Caribbean territories as demonstrated by involvement in projects treating with public health issues.
- A strong understanding of the role of monitoring and evaluation to support health systems strengthening.
- Experience working with Caribbean countries will be an asset.

The Firm's Team Members must be independent and free from conflicts of interest in the responsibilities they take on.

5. Reporting Requirements and Time Schedule for Deliverables

- The intended start date is May 2021 and the period of implementation of the contract will be approximately five (5) months from this date.
- The assignment will be carried out under the direct supervision of the Monitoring and Evaluation Specialist, CARPHA, who will be responsible for approving all Reports of the Firm.

Table 2 below outlines the specific deliverables and timelines associated with the consultancy.

Table 2 : Deliverables and Timelines associated with the Consultancy		
Name of Report	Deliverable	Timeline
Inception Report	<p>Report will be no more than 12 pages and will include summaries of meetings with CARPHA M&E Specialist and other relevant staff for reviewing and developing the relevant M&E manuals, materials and tools. Report will also include detailed workplan with the timelines for the specific project activities and the methodology for the activities. List of proposed survey questions for M&E Training Needs Assessment should also be included.</p> <p>The Firm shall incorporate the client's comments on the report into a revised submission, no late than five (5) days following receipt of those comments</p>	2 weeks from start of the contract.
Interim Progress Report 1	<p>In the Report, the Firm will describe progress made with the execution of the scope of works, challenges encountered and action to be taken to address challenges as well as a summary of the data/information gathered and preliminary findings. The Report will be no more than 12 pages and will include as Annexes: Evaluation Protocols and Initial Needs Assessment findings</p> <p>The Firm shall incorporate the client's comments on the report into a revised submission, no late than five (5) days following receipt of those comments</p>	2 months from the start of the contract
Interim Progress Report 2	<p>In the Report, the Firm will describe progress made with the execution of the scope of work, challenges encountered, and action taken to address challenges. The Report will be no more than 12 pages and will include as Annexes: Report of M&E Training Needs Assessment; first drafts of updated/revised Basic and Advanced M&E Manuals and related modular training manuals.</p>	3 months from the start of the contract

Table 2 : Deliverables and Timelines associated with the Consultancy		
Name of Report	Deliverable	Timeline
	The Firm shall incorporate the client's comments on the report into a revised submission, no late than five (5) days following receipt of those comments	
Draft Final Report	In the Report, the Firm will describe progress made with the execution of the scope of work, challenges encountered, and action taken to address challenges. The Report will be no more than 12 pages and will include as Annexes: Report of M&E Training Needs Assessment; Draft Final Versions of Basic and Advanced M&E Manuals and related modular training manuals. The Consultant will incorporate the Client's comments on the Interim Progress Report, including on the updated versions of the Manuals, into the Draft Final Report	One month before the end of the period of implementation
Final Report	Same specifications as the Draft Final Report. The Firm will incorporate the Client's comments on the Draft Final Report	Seven days after receipt of comments on the draft final report

6. Client's Input and Counterpart Personnel

- a) Services, facilities and property to be made available to the Firm by the Client:
- CARPHA will introduce the Project and the Team Members of the Firm to the relevant focal points in CARPHA Member States and sensitize them to the M&E Training Needs Assessment to be conducted
 - CARPHA will provide the Team Members of the Firm with all the necessary documents via electronic format to facilitate the process.
 - CARPHA will make all the administrative arrangements for the presentation of Draft versions of the Manuals by the Consultant (meeting room at CARPHA, create zoom link, etc).
 - CARPHA will make all of the necessary administrative arrangements for the facilitation of the meetings with the CARPHA personnel.
- b) Professional and support counterpart personnel to be assigned by the Client to Firm:

- The CARPHA M&E Specialist will work closely with the consultant to give guidance and to facilitate stakeholder engagement for the training needs assessment.