**TERMS OF REFERENCE**

**CONSULTANCY SERVICES SOCIAL PROTECTION PROGRAMME SPECIALIST**

**MINISTRY OF PEOPLE EMPOWERMENT AND ELDER AFFAIRS**

**1. BACKGROUND**

1.01 Human development achievements in Barbados, since 1990, have consistently improved and are trending upward, from 0.714 in 1990 to 0.790 in 2021, with a long and healthy life, quality education and training, and a decent standard of living. Significant investments in quality education, accessible health care services, inclusive social services and the economic empowerment of citizens have fostered these high human development attainments in Barbados. A review of the Government of Barbados (GOBD) Approved Estimates of Expenditure over the past 3 fiscal years, 2019—22, reveal that annual approximately 40% Government’s capital and operating expenditure was spent on the social sector in education, health, social protection, housing and community amenities.

1.02 Advances in human development have not yielded equivalent progress towards equality for the women, men, girls and boys of Barbados. The sustainable development of Barbados, like other Caribbean countries, is threatened by the issues of gender inequality, unemployment, and poverty and vulnerability, among the population. The Country Gender Assessment for Barbados (CDB 2016), outlined the following disparities in gender participation rates accordingly: female participation in Parliament (16.9%); secondary education pass rates of 89.5% for females and 87.6% for males; labour force participation rates of 64.8% and 76.2% for females and males, respectively; maternal mortality ratio of 27 and adolescent fertility rate of 40.8, where the average rates are 15 and 18.7, respectively. The latter two statistics demonstrate poor sexual and reproductive knowledge and outcomes and, coupled with the sexual division of labour with females prominently in low skilled, low pay and often informal employment, demonstrates the need for greater gender equality.

1.03 Notwithstanding advances in human development, the sustainable development of Barbados has been seriously challenged over the past five years. The COVID19 Pandemic, in addition to the effects of climate change and other exogenous shocks, have produced a plethora of challenges which stand to exacerbate existing social protection gaps. Additionally, the Russian war in Ukraine which commenced in early 2022, has further impacted struggling economies such as Barbados with the resulting rising inflation. This has produced an even greater demand for existing social protection services and has led to a decline in available fiscal space. Overall, this has negatively impacted Government’s ability to finance the growing number of vulnerable households requiring social protection coverage within a reduced fiscal space. Therefore, there is a dire need to strengthen all aspects of the social protection framework.

1.04 Between 2020-2022, the most vulnerable households in Barbados have been negatively impacted by the above mentioned exogenous shocks and this has severely restricted their ability to meet this basic daily needs. This has directly resulted in an increased number of persons presenting to the social protection agencies requesting assistance; placing increased pressure on an already overburdened system which is in needs of upgrades. The Welfare Department has reported that during this period the number of persons seeking cash grants has more than doubled; requests for food vouchers has quadrupled and payment of rents and utilities has also seen significant increases.

1.05 In 2022, the Government of Barbados embarked upon its second implementation of the Barbados Economic Recovery and Transformation (BERT II) Plan which was first implemented for a four-year period which commenced in 2018. BERT II aims to restore macro-economic stability, thereby placing the economy on a path of sustainable and inclusive growth. As the successor to BERT I, BERT II is focused on achieving inclusive sustainable growth, while maintaining fiscal and debt sustainability. Central to the execution of BERT II is the implementation of a fiscal strategy which ensures that the fiscal position and Government finances are consistent with the debt anchor through streamlining of expenditure and reforming of the public sector; management of the debt portfolio to minimise costs while also protecting vulnerable groups through strengthened safety nets.

1.06 At the height of the COVID-19 pandemic from March 2020 onwards, the strain on Barbados’ social protection system was evidenced by over 32,000 new unemployment claims paid between March and September 2020, resulting in the payment of over Bds$120 million in unemployment benefits through the National Insurance Scheme. In terms of the consequential impacts of citizens, data shows precipitous increases in the number of vulnerable households with over 70% of households reporting income loss as of April 2020. Females were disproportionately impacted by the pandemic as 47.2% of women reported job loss as compared to 38.1% of men and a substantially greater level of females (71.1%) reported as having to carry the domestic burden in areas such as home schooling and childcare. These realities, the continuing legacies of the 2008 crisis, and Barbados’ ongoing economic reforms will continue to have distributional and differential impacts.

1.07 As such, the incorporation of increased social and gender analysis throughout the implementation of BERT II, is necessary to strengthen equitable and inclusive social policy development. There is a critical need for transformation amongst social welfare programmes to ensure that they are increasingly effective at responding to the needs of the poorest and most vulnerable, protecting them from adverse socio-economic shocks, and overall driving the reduction of poverty in Barbados. Moreover, it is imperative that these programmes are founded on meaningful stakeholder engagements of public, private and civil society and that they are responsive to needs of vulnerable groups such as children, the elderly, women and the disabled.

1.08 A significant proportion of poor and vulnerable persons depend on Government's provision of social safety nets and other social development transfers for their survival and well-being. At present, there is a pressing need to generate social protection policies that: (a) take into account the inequalities that existed prior to the crises; (b) incorporate programmes that acknowledge that inequalities will worsen through the recovery programme; and (c) include frameworks that will lead the country towards a more equitable and inclusive position in the future.

1.09 The Ministry of People Empowerment and Elder Affairs (MPEA) is the central Government agency responsible for the delivery of social safety-net services. However, there is limited institutional capacity within the MPEA for social policy analysis; research and planning; monitoring and impact evaluation; and integrating social and gender issues into national budgets during this period of economic transformation. This limited institutional capacity has constrained its ability to effectively deliver on its social development mandate.

1.10 It is noted that since 2018, the MPEA has, in collaboration with the CDB and other development partners, embarked upon institutional strengthening exercises to improve social protection delivery. The MPEA has expanded the utilisation of technology-driven evidenced-based programming, commenced the rationalisation of the social protection framework and the delivery of targeted programming aimed particularly at the most vulnerable in society. These efforts are intended to bring a greater degree of coherence to the national social protection framework to ensure its continued efficacy and resilience to improve the living conditions of the vulnerable, particularly as Barbados seeks to emerge from the insidious social and economic effects of COVID-19.

1.11 Despite the progress made, the MPEA continues to experience challenges in its social planning, evidenced-based programming, effective targeting of the most vulnerable, and forecasting the potential impacts of the economic policies on the population. The institutional capacity for social policy, research, planning and budgeting is necessary to ensure the effectiveness, efficiency, equity and accessibility of investments to the poor and vulnerable groups within the population and strengthened resilience of the social sector.

**2. OUTCOME**

2.01 The broad outcome of the Technical Assistance (TA) is enhanced capacity of MPEA to deliver social protection programmes in the context of the implementation of BERT II. Specifically, this consultancy entails:

(a) providing technical support to the MPEA in the planning, management and coordination of social protection programmes which consider the existing socio-economic challenges including the risks and mitigating the adverse impacts of BERT II on poor and vulnerable populations; and

(b) laying the foundation for stronger partnerships and coordination of programmes to undergird the implementation of critical social protection reforms to support the achievement of key medium—term macroeconomic results and the progressive realisation of an enhanced social protection system.

3. **SCOPE OF ASSIGNMENT**

3.01 Within the context of the key priority areas to enhance the Social Protection Framework in Barbados, the Social Protection Programme Specialist will perform the following functions:

(a) support day—to-day operational needs for technical assistance to the MPEA in the planning and delivery of social protection programmes and services by initiating and promoting synergies with cross—sectoral programmes and contributing to an adequate mixture of protective, preventive, promotive and transformative measures for an enhanced social protection system which can mitigate the direct and indirect risks and adverse impacts of BERT II and the COVID-19 pandemic on poor and vulnerable populations;

(b) provide technical support to the MPEA for the delivery of social protection programmes, the implementation of BERT and the execution of the Enhanced Country Poverty Assessment to ensure that programme implementation and budgetary processes address social and gender equity, inclusion and exclusion errors, discrimination, abuse and reducing the consequences and impacts of shocks before they occur;

(c) in the context of ongoing institutional reformation exercises within the MPEA, provide technical support to the Ministry, its departments and other stakeholders for the design and implementation of new innovative social protection programmes such as the One Family Programme which can help to reduce the likely impacts and consequences of shocks before they occur;

(d) provide guidance to the MPEA with regards to ongoing activities to upgrade and streghthen the social protection systems. This includes activities such as the technical appraisal and analysis of the Social Sector delivery systems to foster affordable and equitable access to basic services; the development of a MIS for the centralised application and registration of beneficiaries; the adequacy of design in testing measurements and targeting mechanisms; a well-defined system of referral and graduation strategies; and the comprehensive mapping of social services to protective, preventive, promotive and transformative measures in order to enhance equity, efficiency and transparency of ongoing delivery of social protection programmes and services;

(e) Work with the Bureau of Social Policy Research and Planning to update and strengthen the existing Barbados Social Protection Policy, Strategy, and Implementation Plan for a Rationalised National Social Protection System 2021 – 2024;

(f) Collaborate with the Social and Gender Advisor within the MPEA to conduct a preliminary assessment of the social and gender risks associated with the implementation of BERT II and GOBD Budgetary measures, as well as the differential impacts of COVID-19 and recent covariant shocks, including the impact on households of the new and revised tax regime, increases in income taxes, water, transportation and fuel taxes/prices, and how these risks can be mitigated; and assess the social and gender dimensions of the impact of economic policies;

(g) provide support for the integration of social and gender baseline data and monitoring indicators in the implementation of the social protection programmes and services with special emphasis on the impact and risks of the BERT II Programme;

(h) Provide ongoing technical support and inputs to the MPEA and the National Assessment Team which will guide the team of consultants completion of the research and data collection; data analysis and reporting with regards to the execution of the Enhanced Country Poverty Assessment;

(i) develop and/or strengthen the coordination mechanism and promote, support and facilitate participation and partnerships amongst social sector Ministries, Agencies, Civil Society and Development Partners in collaboration with the Social and Gender Advisor, MPEA, for the implementation of an integrated shock-responsive social protection system;

(j) Provide support to the Social and Gender Advisor in their work to analyse the GOBD’s social sector expenditure and outline budgetary plans for affordable and sustainably-financed social protection programmes, including interventions, services, capacity-development activities, knowledge products, and business line processes, that will support the establishment/enhancement of an integrated, systematic and sustainable social protection system.

4. **QUALIFICATIONS AND EXPERIENCE**

The candidate should have at least the following qualifications and experience:

* 1. . Qualifications

A Master’s degree in: sociology; development studies, development economics, or related social science field.

4.02. Experience

* Ten years’ experience in the design and management of social protection programmes, social and gender analysis, planning and policy formulation, and been involved at a senior level in the implementation, monitoring and evaluation of social protection, poverty reduction and safety nets programmes in Small Island Developing States (SIDS);
* Ten years’ in-depth knowledge and working experience of the regional and local socio-economic context in general, and working closely with senior government officials,
* Ten years experience working with public institutions, governments, and development partners in socio-economic policy formulation;
* At least ten years’ working experience in mentoring/training and providing technical direction and guidance to less experienced staff and should possess excellent analytical, communication, presentation and team-leadership skills, as well as the ability to interact and negotiate at a senior management level.
* Working knowledge of the Barbados public sector and in depth knowledge of the Barbados socioeconomic context would also be an asset.

5. **DURATION**

6.01 The duration of the assignment is over an 18-month period.

**6. DELIVERABLES**

7.01 The consultant will be required to provide the following:

(a) an Inception Report detailing the approach to be adopted to successfully deliver the expected outputs, four (4) weeks after commencement of the assignment;

(b) Technical Appraisal and Analysis of the Barbados Social Protection Programmes and Services within twelve (12) weeks of commencement of the assignment as outlined in 3 (c), (e) and (i) above;

(c) Gender Audit Reports of social protection programme agencies and services within twelve (12) weeks of commencement of the assignment as outlined in 3 (a) above;

(d) Draft Final Report on the conduct of the training at least one (1) month after the end of the training activities. Report should include pre and post—training evaluation information and a long—term training plan. A Final Report on the conduct of the training activities within three (3) weeks after the feedback on the Draft is submitted.

(e) Policy Brief on Harmonisation of Services and Programme Convergence within the Social Protection System for policy formulation, planning, social budgeting and research within fifteen (15) months of commencement of the assignment, as detailed in Section 3 (a), (b), (e) and (f); and

**7. PLACE OF WORK & IMPLEMENTATION ARRANGMENTS**

The Consultant will work in close collaboration with the Social and Gender Policy Advisor in the MPEA.

GOBD will facilitate the consultant by providing access to relevant documentation and other pertinent information necessary for undertaking the assignment.

**8. REPORTING REQUIREMENTS**

(8.01) The consultant will report to the Permanent Secretary, MPEA or his designate, who will have responsibility for the overall management and implementation of the consultancy.

(8.01) Six (6) Monthly Progress Reports, indicating milestones achieved for the overall consultancy. The consultant should make presentation of the summary of the progress achieved in the first year of the overall consultancy to representatives of CDB Senior Management, the Economics Department and the Social Sector Division (SSD) in the final quarter of that 12- month period, as part of its ongoing efforts to strengthen its knowledge of the economic, social, and environmental landscape of Barbados.

(8.02) All reports must be produced and submitted to the Permanent Secretary, MPEA in both print and electronic (Microsoft Office) format. Officials in MPEA and CDB shall provide feedback to the consultant within two (2) weeks of receipt of the reports. All reports shall be copied to the Director of the Projects Department and the Division Chief of the SSD, CDB.