**TERMS OF REFERENCE**

**CONSULTANCY SERVICES FOR SOCIAL AND GENDER POLICY ADVISOR**

**MINISTRY OF PEOPLE EMPOWERMENT AND ELDER AFFAIRS**

**1. BACKGROUND**

1.01 Notwithstanding advances in human development, the sustainable development of Barbados has been seriously challenged over the past five years. The COVID-19 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. As a result, Government has faced greater difficulty in financing 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.

1.02 In 2022, the Government of Barbados embarked upon its second implementation of the Barbados Economic Recovery and Transformation (BERT) Plan which was first implemented for a four-year period commenced in 2018. The BERT aims at restoring macro-economic stability and putting the economy on a path of sustainable and inclusive growth. As the successor to BERT, BERT II is focussed on achieving inclusive sustainable growth, while maintaining fiscal and debt sustainability. Central to the execution of BERT 2022 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.

1.03 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 impacts.

1.04 As highlighted in the 2019 IDB Gender Assessment of Public Expenditure; despite progress made there are still gender and development issues which much be addressed. The evidence shows that despite the achievement the achievement of Gender Parity in education, there is glaring inequality in educational success of women when compared to men with women achieving higher educational success. Nonetheless, despite the educational success there are still glaring income inequalities with an approximately 17% wage gap where men earn more than women. This especially occurs in the private sector.

1.05 It has been noted that in Latin America & the Caribbean, the average labour market participation rate of women is approximately 50%; well below the 75% rate of men (ECLAC 2022). It is also further noted that where women do participate in the labour force, they tend to be underemployed and/or predominantly employed in informal sectors. The 2019 IDB study on Gender also found widespread gender stereotyping in occupation. Males tend to be employed in predominantly physically intensive jobs and in sectors such as transport, electricity and gas and the goods producing industries (natural resources, mining and construction). On the other hand, women are located in jobs that require inter-personal skills such as health, social work, education, service provision and hospitality. This has been even further complicated by the COVID-19 Pandemic which has disproportionately affected women and men differently due to their distinct roles which sees women being the primary care givers. With this in mind, a greater effort must be made to measure and recognise the value of this unpaid care work performed by women.

1.06 The existing gender disparity is clearly reflected in the concentration of poverty in female headed households. The 2016 IDB Survey of Living Conditions found the household poverty rate for female-headed households was 21% compared to 14% for male-headed households.

1.07 It is noted that since 2018, the GOBD has, in collaboration with the CDB and other development partners, embarked upon a number of institutional strengthening exercises to address historical shortcomings in the aforementioned areas. These efforts are intended to bring a greater degree of coherence to the national social protection framework to ensure its continued resilience and relevance to the vulnerable, particularly as Barbados seeks to emerge from the insidious social and economic effects of COVID-19 Pandemic.

1.08 In 2021, based on the United Nations Development Programme (UNDP) Gender Inequality Index (GII), Barbados scored aI value of 0.268, ranking 64th out of 162 countries. This is a decrease from the score of 0.252 attained in 2019. Whereas this decline in GII can be partially attributed to the impact of the COVID-19 Pandemic, it shows that there is need for reinvigorated gender planning and strategy to ensure that gender equality is achieved.

1.09 Evidently, there is a need for greater gender analysis and the creation of responsive gender-responsive policies which will promote and enhance gender equality and gender mainstreaming. Despite the progress made, the GOBD continues to experience challenges in effectively integrating gender into its national financial and social planning. In addition, the institutional capacity within the Bureau of Gender Affairs within the MPEA is undersupplied for integrating social and gender issues into the national budget allocation and processes. The full integration of gender into social policy, research, planning and budgeting is necessary to ensure gender equality and gender mainstreaming.

1.10 As such, the Caribbean Development Bank (CDB) recommends the incorporation of increased social and gender analysis into Government programming throughout the implementation of BERT II 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 third sector organizations and that they are responsive to needs of vulnerable groups such as children, the elderly, women and the disabled.

**2. OUTCOMES**

2.01 The broad outcome of the technical assistance (TA) is the enhanced capacity of the GOBD to implement BERT II in a Gender responsiveness manner and to improve the integration of Gender into the delivery social protection programmes. Specifically, this consultancy entails enhanced technical support to the MPEA and the MFEAI to:

(a) integrate the social and gender imperatives including analysis and outcomes in the overall social protection pillar of the BERT II as well as the socio-economic policy, planning and management framework of GOBD;

(b) strengthen the social and gender baseline data and monitoring indicators in the implementation of BERT II to achieve equitable and sustained socio-economic results, while mitigating the adverse impact on the poor and vulnerable populations;

(c) support the coordination of social protection programmes among Social Sector Ministries, Private Sector, Third Sector and Development Partners, laying the foundation for stronger partnerships to support the achievement of positive development outcomes in the implementation of the BERT II Programme; and

(d) strengthen the capabilities of technical staff within the MPEA to identify and analyse social and gender issues, needs, gaps, adverse impacts and mitigation measures.

3. **SCOPE OF ASSIGNMENT**

(a) Provide ongoing, hands-on support, and appropriate technical support and inputs in partnership with the Social Protection Programme Specialist to support evidence-based decision-making to integrate the social and gender needs of the population into the delivery of the social protection programmes, the implementation of BERT II and the CDB-supported Enhanced Country Poverty Assessment.

(b) Provide technical support to the Bureau of Gender Affairs to enhance the strategic planning and delivery of their programmes, activities and policy development to achive gender mainstreaming strategies across the Government and Private Sector.

(c) In collaboration with key stakeholders from the MFEAI, review the implementation of BERT II with a specific focus on Gender. This should include a preliminary assessment of the social and gender risks associated with BERT II and GOBD Budgetary measures, 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, to support the achievement of key medium-term macroeconomic results while mitigating the adverse social and gender impact on the populations.

(d) Provide technical support for the design, implementation and monitoring of critical social protection reforms among Development Partners, enhancing synergies, coordination, efficiency and effectiveness, to support the achievement of key medium-term macroeconomic results while mitigating the adverse social and gender impact on the populations.

**4.** **QUALIFICATIONS AND EXPERIENCE**

The candidate should have at least:

* 1. Qualifications

a Master’s degree in sociology; development studies, development economics, or related social science field. In addition to the first mentioned Master’s degree, a degree or diploma in gender studies will be an asset.

4.02 Experience

* Ten years’ experience in social and gender analysis, planning and policy formulation and been involved at a senior level in undertaking gender audits and providing policy advice in the areas of socio-economic policy, gender mainstreaming and growth, social protection and safety nets, development and poverty reduction strategies, public finance for vulnerable groups, and child and gender-responsive budgeting;
* 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;
* Working knowledge of the Barbados public sector and in-depth knowledge of the Barbados socio-economic context would also be an asset.
* Ten years’ working experience in mentoring/training and providing technical direction and guidance to less experienced staff and should possess excellent communication, presentation, analytical and team—leadership skills, as well as the ability to interact and negotiate at a senior management level.

**5. DELIVERABLES**

5.01 The Consultant will be required to provide the following:

(a) an Inception Report detailing the current social policy landscape, including programmes, services, agencies, partners, key priorities, expected overall and intermediate outcomes, targets, capacity, budgets and financing needs, gaps and the approach to be adopted to successfully deliver the expected outputs four (4) weeks after commencement of the assignment;

(b) preliminary Assessment of the Social and Gender Risks Report of BERT II within eight (8) weeks of commencement of the assignment as detailed in 3 (d) above;

(c) Within three (3) months of the commencement of the assignment, conduct a gender audit of social protection programme agencies and services to identify and analyse the issues, needs, gaps, impacts (positive and adverse) and mitigation factors that hinder efforts to mainstream gender across the agencies and programmes;

(d) Within six (6) months, develop and implement gender mainstreaming strategies in planning, budgeting and delivery systems of ongoing social protection programmes and services, and

(e) Analyse GOBD’s social sector expenditure and social protection programme delivery and provide guidance on the reform activities (including interventions, services, capacity development activities, knowledge products, and business line processes) which can enhance synergies, coordination, efficiency and effectiveness to support the achievement of positive outcomes from key medium-term socio-economic interventions. A final report should be produced within 12 months of commencement of the assignment.

(f) Produce results monitoring reports every six months to the PS MPEA on the progress and achievements among Social Sector Ministries and Development Partners to identify and analyse the successes, issues, needs, gaps, gender outcomes, adverse impacts and mitigation measures in programme implementation.

(g) Prepare Policy Briefs and Social Expenditure Analyses for evidence-based decision- making on the issues, needs, gaps, impacts, mitigation measures and lessons learned in the implementation of the BERT II Programme among the Social Sector Ministries as requested by the Permanent Secretary MPEA.

(h) The Consultant should make a 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.

**6. DURATION**

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

**7. PLACE OF WORK AND IMPLEMENTATION ARRANGEMENTS**

The Consultant will work in close collaboration with the Social Protection Programme Specialist in the MPEA.

GOBD will facilitate the Consultant by providing access to relevant documentation and other pertinent information necessary for the completion of the assignment.

**8. REPORTING REQUIREMENTS**

8.01 The Consultant will report to the Permanent Secretary, Ministry of People Empowerment and Elder Affairs, or his designate, who will have responsibility for the overall management and implementation of the consultancy.

8.02 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.

8.03 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.