**DRAFT TERMS OF REFERENCE - CONSULTANCY SERVICES FOR**

**FORMULATION OF A MEDIUM-TERM DEVELOPMENT STRATEGY AND**

**INVESTMENT PLAN, 2025-29 FOR SAINT KITTS AND NEVIS**

1. **BACKGROUND**
	1. The twin island Federation of Saint Kitts and Nevis (SKN) has a combined land area of 269 kilometres square and a total estimated population of 47,657 (2022). The economy of SKN has traditionally been geared towards agriculture, primarily sugar, which has been the main industry for over 300 years. However, the contribution of the sugar industry to gross domestic product (GDP) has declined over time, incurring losses of approximately 3%-4% of GDP annually during the period 2000‑2005. This was exacerbated by the removal of longstanding preferential access to the European market. The Government of Saint Kitts and Nevis (GOSKN) made the decision to close the industry in July 2005. GOSKN launched the National Adaptation Strategy (NAS) 2006-2013, to guide the socio‑economic transformation of the economy. Since its implementation in 2006, several priority actions outlined as part of the NAS have been advanced. However, in 2008 due to the limited inflows of capital brought on by the global financial crisis and economic downturn and delays in the implementation of the NAS, GOSKN extended, in 2013, the period of implementation to 2017.
	2. With an increasing global focus on climate change, GOSKN recognised that the threat of climate change to national development would need to be addressed through its integration in its development planning initiatives. It is with this in mind, that GOSKN approached the Green Climate Fund in 2019 for assistance through its Readiness Programme. With assistance from the Caribbean Development Bank (CDB), the National Development Planning Framework (NDPF)[[1]](#footnote-1) was created within an environmental lens, designed to guide the green transformation of the country over the next 15 years. The execution of the strategic priorities outlined in NDPF will require a significant financial and human outlay. Added to this, the Implementation Plan lacks specific targets, outputs, and indicators to guide development. Considering this, GOSKN is desirous of formulating a medium-term development strategy and investment plan (MTDSIP) 2025-29, to:
2. prioritise and outline the key investments required to advance the NDPF in the short‑to‑medium term, and provide a high-level design of the key investment projects and legislative and policy changes required;
3. identify the critical resources (financial and human) needed to operationalise the short and medium-term economic, environmental, and social transformation outlined in the NDPF; and
4. outline the specific output and outcomes, and their indicators and targets, that GOSKN will be pursuing during the period. This medium-term strategy will be built on the strategic priorities and actions catalogued in the NDPF’s Implementation Plan, 2023-2037.
5. The MTDSIP, once developed, will serve to guide SKN over the corresponding period under the six development focal areas identified in the NDPF’s implementation plan ‒ that is, climate resilience; human capital development; green energy transformation; economic development; gender mainstreaming and inclusivity and social development; and institutional strengthening and partnership. The strategy will also provide the monitoring and evaluation (M&E) mechanism to track the progress of the plan. Together, the NDPF, its Implementation Plan, and the medium-term strategy will support the realisation of intended development goals of SKN.
	1. The objective of this assignment is to operationalise the implementation of the 15-year NDPF through the formulation of a MTDSIP, and an accompanying M&E framework, to guide the development of SKN over the five years, 2025-29.
	2. The Project will be implemented by the Ministry of Economic Development and Investment (MEDI). MEDI’s mission is to create the enabling environment that would attract and maintain a continuous and viable flow of opportunities to advance the lives and livelihoods of all citizens. To execute the mission, among MEDI’s responsibilities are: monitoring and evaluating the implementation of national economic plans and policies; identifying and supporting strategic sectors in developing projects to meet the national agenda; and advising on strategic policies adjustments and requirements necessary to drive economic development.
6. **OBJECTIVE**
7. The main objective is to develop the MTDSIP 2025-29 for SKN, inclusive of a M&E framework that will incorporate the use of a digital reporting and visualisation tool. This consultancy will specifically carry out the activities outlined in Section 3. With respect to the critical tasks identified below, the Consultant firm (hereinafter “**the Consultant**”) is required to collaborate closely with stakeholders in-country.
8. **SCOPE OF SERVICES**
9. The scope of services to be provided by the Consultant is as follows:

In carrying out this assignment, the Consultant is required to employ a collaborative approach and close engagement with each other, national authorities, stakeholders, and their focal points in ensuring that the deliverables are consistent with what is outlined in the NDPF and Implementation Plan, and consistent with the requirements of the Terms of Reference (TOR). The Consultant should draw on regional and international examples considered best practice in executing tasks. The Consultant will:

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| **TASK 1** |
| Specific Activity: | Produce an Inception Report |
| Task Output: | Inception report outlining the finalised methodology and project timeline. |
| Work to be completed |
|  | 1. Submit a detailed inception report inclusive of a detailed work plan for the execution of the assignment as outlined in all tasks (task 2 and task 3) below. The Inception Report will validate and refine the Consultant’s methodology for undertaking the assignment.
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| **TASK 2** |
| Specific Activity: | Utilise best practices, and extensive consultations to develop the Draft and Final/Approved versions of the NDPF’s Medium-term Strategy and Investment Plan.This task will:1. produce a structure that will facilitate the operationalisation of the NDPF (2023‑2037), to identify key investments and reform actions, and associated costs and financing sources; and
2. outline a results monitoring framework (RMF) for the Strategy.
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| Task Output: | Draft version of the NDPF’s MTDSIP; final version addressing all stakeholder comments and receiving MEDI approval. |
| Work to be completed |
| 1. In delivering the work outlined below, the Consultant shall, in collaboration with the Project Coordinator, devise and implement a mutually agreed plan for knowledge transfer. This can include the delivery of workshops and/or other effective initiatives, such as work shadowing and mentorships, for sharing knowledge, skills, expertise and best practices, through regular meetings, coaching sessions, and guidance, that will help build capacity in the Economic Development Department of MEDI. The Consultant can also seek support from national consultants to support the Consultant’s key experts.
2. Review the NDPF and its implementation plan, as well as relevant documentations that can inform the development of the MTDSIP.
3. Consult with key stakeholders in SKN in crafting the Medium-Term Strategy and Investment Plan, to ensure its content and structure is in keeping with the country’s short-to-medium term development priorities. Stakeholder engagement should include, but not be limited to, representatives of all line ministries and other stakeholders who have contributed to the NDPF.
4. The MTDSIP should outline the sector strategies and a high-level design of the key investment projects and legislative and policy changes required, to achieve the NDPF goals during the five‑year planning horizon. It should take consideration of all already ongoing and planned projects, both government and externally funded, that will contribute to the NDPF goals. All projects implemented by government ministries, government agencies, public corporations, international financial institutions, public-private partnerships, and the Citizenship‑by‑Investment programme in both islands of SKN should be considered.
5. Create an implementation plan providing the sequencing and timing of MTDSIP activities.
6. Develop, in consultation with the Department of Public Sector Investment Planning in the Ministry of Sustainable Development, an investment and financing plan that provides reasonable cost estimates for the proposed projects and the overall medium-term strategy, along with likely funding options and associated terms and conditions that align with the cost and risk objectives set out in the country’s debt management strategy.
7. Evaluate and provide guidance to improve processes used to review, prioritise, and select appraised projects for inclusion in the capital budget.
8. Design a RMF as part of the MTSDIP, to identify the key outputs, outcomes and related indicators and targets to track the results achieved over the strategy’s implementation period. The RMF will also detail the sources, frequency, and the persons responsible for producing or collecting the data and the methods for reporting results.
9. Recommend and support MEDI to put in place institutional arrangements for coordinating the implementation of the MTDSIP, and for maintaining support and assistance from senior management and government ministers during implementation, including identifying and removing bottlenecks and ensuring accountability of implementing agencies.
10. Facilitate a one-day validation workshop in hybrid format (face-to-face and virtual), on the proposed Draft Strategy and Investment Plan in SKN.
11. Finalise the Strategy and Investment Plan based on comments and feedback from MEDI and other stakeholders.
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| **TASK 3** |
| Specific Activity: | Develop a M&E framework for the Medium-Term Strategy and Investment Plan. |
| Task Output: | Draft version of the M&E Framework; final version addressing all stakeholder comments and receiving MEDI approval.M&E training workshop. |
| Work to be completed |
| 1. Develop a **stakeholder engagement strategy and action plan** that will identify key stakeholders and their specific roles and responsibilities in implementing the MTDSIP and M&E Framework.
2. Develop a programme logic or theory of change outlining what the MTDSIP aims to achieve and the key assumptions and risks.
3. **Evaluation Strategy**: Work collaboratively with the Strategic Planner (see Task 2 above), MEDI, Department of Statistics, and other relevant stakeholders in the design of the M&E plan of the MTDSIP, that is appropriate to the SKN context, includes quantitative and qualitative approaches to M&E, and has special focus on climate and gender-sensitive areas. For purposes of future evaluations that would inform the design of subsequent MTDSIPs over the NDPF horizon, the M&E Specialist would also collaboratively determine the evaluation questions, methodology/design, evaluation criteria, timing, data collection and analysis strategy.
4. **Implementation** **Monitoring**: Recommend procedures and systems for collecting data for monitoring the financial and physical implementation progress of all projects in the public investment portfolio (including externally funded projects) that are intended to contribute to MTDSIP outcomes.
5. Design a **reporting and lessons learning strategy** which sets out reporting requirements and templates, to provide senior management and ministers with updates on progress toward outputs and outcomes of the Strategy, and with information on project issues and risks relevant to their decision‑making processes. General templates and templates for large capital projects and projects with external funding partners, as well as a template to report annually on overall portfolio progress toward MTDSIP outcomes, should be included. Provide guidelines for identifying and sharing lessons learnt during implementation and for conducting *ex-post* reviews of completed projects to garner lessons learnt, to improve the design and implementation of future projects.
6. Assess current M&E skill gaps in MEDI and other line ministries and recommend a **training programme** for relevant officers to competently track and report progress of NDPF implementation.
7. Develop a **digital reporting and visualisation tool** based on the Strategy’s M&E Plan developed in TASK 2 above. The purpose of this tool is to track implementation progress on Strategy and NDPF outcomes. The Consultant should detail software options for data tracking[[2]](#footnote-2) and for visualisation, which are compatible with existing information technology systems; sources and systems for collecting data on baselines and targets for output and outcome indicators; and visual representations/dashboards from which MTDSIP progress and trends and insights on key performance indicators can be readily obtained, being easily readable and relevant to high-level decisions makers, for each of the six pillars of the NDPF.
8. Prepare a draft document outlining the M&E framework, including all guidance, procedures, tools and templates recommended in relation to all above work undertaken for TASK 3.
9. Facilitate a one-day validation workshop, in hybrid format (face-to-face and virtual), on the M&E framework and training for stakeholders on the procedures, tools and templates.
10. Finalise the M&E Framework document based on comments and feedback from MEDI and other stakeholders.
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**Mainstreaming Gender Equality and Climate Change**

1. The Consultant is required to systematically integrate gender equality and climate change considerations into the design of the MTDSIP and its M&E Framework such that the following elements are included:
2. Involvement of both men and women in constituents’/beneficiaries’ consultations and analysis, inclusive of climate risk analysis.
3. Collection and use of sex-disaggregated data and other key social variables to support the analysis and key interventions in the MTDSIP.
4. Gender-responsive and climate-resilient design of the investment projects and legislative and policy changes proposed in the MTDSIP.
5. Gender-responsive and climate-sensitive objectives, outcomes, outputs, activities, and gender‑specific indicators.
6. Gender and climate-smart institutional arrangements recommended for implementation and monitoring of the MTDSIP.
7. Gender-responsive and climate-sensitive monitoring procedures.
8. Design for evaluations requiring the inclusion of impact assessment on gender equality and climate resilience, and gender and climate change expertise in the evaluation team.
9. Inclusion of an evaluation scope, criteria, and questions, using gender-responsive and climate‑sensitive methodology, tools and data analysis, including sex-disaggregated and climate-related data.
10. Presentation of findings, conclusions and recommendations reflecting gender and climate change analyses.
11. **DELIVERABLES AND REPORTING REQUIREMENTS**
	1. The following deliverables shall be submitted at the times indicated below:
12. Inception Report and detailed workplan within two weeks of engagement.
13. Draft medium-term strategy and investment plan, within three months of commencement of the assignment.
14. Draft M&E framework and related guidelines, tools, and templates within four months of commencement of the assignment.
15. Face-to-face training and validation workshops completed within four months of commencement of the assignment.
16. Approved medium-term strategy and investment plan and M&E Framework within six months of commencement of the assignment.
	1. All reports shall be prepared in English and submitted electronically in PDF format, as well as in an original editable Microsoft Office format. All data and other frameworks (including Excel sheets and tables) developed must be produced in an editable format to MEDI. GOSKN and CDB will provide comments on the reports within two weeks of receipt and the Consultant will adjust the ongoing work according to the comments received.
17. **IMPLEMENTATION ARRANGEMENTS**
18. The consultancy is commissioned by GOSKN. The Consultant will report to MEDI for contractual and administrative purposes. MEDI will provide additional technical advice and inputs, overall coordination, and oversight for this consultancy. The Consultant will liaise with MEDI and will ultimately report to MEDI.
19. GOSKN will provide the following inputs and facilities:
20. Background documents and information relevant to the assignment that are readily available and accessible.
21. Issue the relevant introductory letters and facilitate contact with the relevant stakeholders, as necessary.
22. Organise conference call meetings with the Consultant to address any questions or concerns and to receive updates about progress made on the activities and expected outcomes.
23. Participate in structured discussions with the Consultant to address any questions or concerns and to provide updates about progress made on the Assignment.
24. Review draft reports within 10 working days of submission, providing feedback to the Consultant.
25. Facilitate the validation workshop.

**QUALIFICATIONS AND EXPERIENCE**

1. The assignment is to be undertaken by a Consultant with adequate experience and suitably qualified experts. The selected Consultant will be responsible for all required/specified deliverables. The Consultant must specify the qualifications and relevant experience of each expert to be assigned to this assignment.

**Qualification of the Consultant and Key Experts**

1. The Consultant is required to possess the following competencies for the successful execution of this assignment:
2. A minimum of three assignments in conducting Institutional Assessments, designing Institutional Planning Frameworks and Strategies and the development of digital monitoring platforms over the past five years.
3. A Minimum of five years’ experience working with Economic Planning and Investment organisations and governments in developing these specific services.
4. Possess experience working with two Small Island Developing States (SIDS) and/or Least Developed Countries (LDCs) in the past seven years. Experience working in the Caribbean would be an asset.
5. At a minimum, the Consultant should have the following key experts, and the key experts should have the following Education and Experience Qualifications:

**Strategic Planner/Team Leader**

* Minimum of a Graduate Degree in Development Studies, Economic Planning, Strategic Planning, Strategic Management, Economics, or Public Policy, with a strong background in economics.
* At least 10 years’ experience in a Planning Ministry, Ministry of Finance, or an international development institution where in-depth knowledge of development planning, macroeconomic management and public investment management were prerequisites for his/her job performance.
* Demonstrated experience over the past seven (7) years in designing national development plans is required, supported by at least one (1) specific example of national development plan(s) designed, including the scope, objectives, and outcomes.
* Demonstrated experience in conducting socio-economic analysis and research required. At least one (1) specific example where socio-economic analysis and research was the core of the assignment within the last seven (7) years.
* Demonstrated experience in formulating various sector strategies, and related public investment projects and policy reforms required. At least 3 instances where formulating strategies were the core of the assignment within the last seven (7) years.
* Demonstrated experience mainstreaming climate change resilience in national development policies and programmes required - at least two assignments in the last seven (7) years.
* Demonstrated experience mainstreaming and gender equality in national development policies and programmes required - at least one assignment in the past seven (7) years.
* Two assignments of experience within the last ten (10) years years' in mainstreaming the Sustainable Development Goals and other international obligations in national development policies and programmes required.
* Five assignments within the last ten (10) years of experience in designing Risk Management Frameworks (RMFs) required.
* Proven experience in formulating resource mobilisation strategies for finance and human resources for development programmes required in at least three (3) assignments in the last seven (7) years.
* Experience in conducting institutional analysis and defining institutional arrangements for effective programme implementation required in at least three (3) assignments in the last seven (7) years.
* Demonstrated experience managing a Multisectoral Team in at least three (3) assignments in the last seven (7) years.
* Proven record of engagement (coordination and working) with national counterparts (including senior government officials at national and state level), partners and donors in SIDS and LDCs in at least three (3) assignments in the last seven (7) years.
* Proven experience in facilitating and leading consultations and workshops with a wide selection of stakeholders from both the public and private sectors in at least three (3) assignments in the last seven (7) years.

 **Monitoring and Evaluation Specialist**

* Minimum of a Graduate Degree in M&E, Project Management, Public Policy, Development Studies, or Economics.
* Specialist training and suitable qualifications in M&E or Results Based Management from an accredited organisaton or institution.
* In the last ten (10) years’ experience working on Monitoring, Evaluation, and Learning (MEL) projects, including for Development Agencies and Multilateral Banks required for at least three (3) of the assignments.
* Proven experience developing and implementing MEL Plans in at least three (3) projects over the past five (5) years is required.
* Proven experience selecting and developing performance indicators in at least three (3) projects is required over the past five (5) years.
* Proven experience developing theories of change and associated logical frameworks in at least three (3) projects over the past five (5) years is required.
* Proven experience with evaluations, surveys, studies, and assessments in at least three (3) projects over the past five (5) years is required.
* Proven experience applying Collaboration Learning and Adaptation approaches (example, pause and reflect, after-action reviews, mid-course stocktaking, learning agendas, etc.) in at least three (3) projects over the past five (5) years is required.
* Experience with data visualisation and knowledge management systems assessments in at least three (3) projects over the past five (5) years is required.
* Experience in providing training and capacity building on MEL in at least three (3) projects over the past five (5) years is an asset.
* Familiarity with relevant M&E data collection and analysis tools, such as Kobo/ODK for data collection, and SPSS, Stata, SAS, R, NVivo, AtlasTI for data analysis, in at least three (3) projects over the past five (5) years is highly preferred.

**Language**

* Excellent oral and written communication skills in English.

**Please note that at the EOI stage, the CVs of experts will not be evaluated. The evaluation will assess the Consultant’s experience in the criteria listed, and the number of staff with such skills and experience will be evaluated.**

**7. LOCATION AND DURATION OF ASSIGNMENT**

7.01 This project is to be implemented in a total of one hundred and twenty-five (125) non-consecutive days (sixty five (65) for the Strategic Planner/Team Leader; and sixty (60) for the M&E Specialist) over 6 months, spread over September/October 2025 to March/April 2026. The assignment is expected to be conducted from the Consultant’s home base. Two trips to SKN for a total of ten (10) consultancy days by each expert are envisioned. The visits are to facilitate consultations, validation exercises, and training.

1. The NDPF was finalised in 2023 and covers the period 2023-2037. It was approved by the Cabinet in January 2024. [↑](#footnote-ref-1)
2. This can be Microsoft Excel or another simple application. [↑](#footnote-ref-2)