

CARIBBEAN DEVELOPMENT BANK

THREE HUNDRED AND TENTH MEETING OF THE BOARD OF DIRECTORS

TO BE HELD IN BRAZIL

JUNE 9, 2025

PAPER BD 59/25

BASIC NEEDS TRUST FUND – ELEVENTH PROGRAMME

Contributors to the Eleventh Cycle of the Unified Special Development Fund (SDF 11) approved a contribution of forty-six million United States dollars (\$46 mn) for the Basic Needs Trust Fund – Eleventh Programme (BNTF 11), [SDF Paper “Replenishment of the Resources of the Special Development Fund Unified (SDF11) - Resolution and Report of Contributors on SDF 11” refers].

2. The overall outcome of BNTF 11 is improved living conditions and quality of life of beneficiaries in selected poor and vulnerable communities in BNTF participating countries. The Programme will improve access to quality education and training, water and sanitation, basic community access, drainage and livelihoods enhancement in low-income and vulnerable communities.

3. Funding for BNTF 11 is estimated at \$53.646 mn. Governments of the 10 participating countries, namely: Barbados, Belize, Commonwealth of Dominica, Grenada, Cooperative Republic of Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname, will provide a counterpart amount of \$7.646 mn. Resources will be committed by December 31, 2026, and disbursed by December 31, 2028.

4. The Board of Directors (BOD) is asked to approve BNTF 11 as outlined in Chapters 4 and 5 of the attached Report and the recommendations set out in Chapter 8 of the said Report.

CARIBBEAN DEVELOPMENT BANK

STAFF REPORT

BASIC NEEDS TRUST FUND - ELEVENTH PROGRAMME

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Considered at the Three Hundred and Tenth Meeting of the
Board of Directors on June 9, 2025

BD 59/25

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CURRENCY EQUIVALENTS

[Dollars (\$) throughout refer to United States dollars (USD) unless otherwise specified]

ABBREVIATIONS

ASPS	Agriculture Sector Policy Strategy
BDS	Barbados
BMC	Borrowing Member Countries
BNTF	Basic Needs Trust Fund
BNTF 9	Basic Needs Trust Fund Ninth Programme
BNTF 10	Basic Needs Trust Fund Tenth Programme
BNTF 11	Basic Needs trust Fund Eleventh Programme
BOD	Board of Directors
BSIF	Belize Social Investment Fund
BZE	Belize
CBOs	Community-Based Organisations
CC	Climate Change
CDA	Community Development Approach
CDB	Caribbean Development Bank
C-ESMP	Contractor's Environmental and Social Management Plan
CLO	Community Liaison Officer
CMVI	Caribbean Multidimensional Vulnerability Index
CNAA	Country Needs and Assets Assessment
CPCR	Country Project Completion Report
CPF	Country Policy Framework
CRM	Customer Relationship Management
DC	Division Chief
DOM	Commonwealth of Dominica/Dominica
DPD	Director, Projects Department
DRM	Disaster Risk Management
EHRD	Education and Human Resource Development
ESD	Environmental Sustainability Division
ESMP	Environmental and Social Management Plan
ESPR	Environmental and Social Performance Report
GBV	Gender Based Violence
GDP	Gross Domestic Product
GRN	Grenada
GRM	Grievance Redress Mechanisms
GUY	Cooperative Republic of Guyana/Guyana
HDI	Human Development Index
HRD	Human Resource Development
KMC	Knowledge Management and Communications
KMCC	Knowledge Management and Communications Consultant
IA	Implementing Agency
ILO	International Labour Organisation
JAM	Jamaica
JSIF	Jamaica Social Investment Fund
LAC	Latin America and the Caribbean
M&E	Monitoring and Evaluation

mn	million
MON	Montserrat
MOU	Memoranda of Understanding
MTE	Mid-term Evaluation
NGOs	Non-Governmental Organisations
OE	Oversight Entity
OM	Operations Manual
%	Percent
p.a.	per annum
PBAS	Performance-Based Allocation System
PC	Participating Country
PCR	Programme Completion Report
PE	Project Engineer
PM	Project Manager
PMC	Project Monitoring Committee
PP	Percentage Points
PWDs	Persons with Disabilities
Q	Quarter
RF	Results-Framework
SDF	Special Development Fund
SDF (U)	Special Development Fund (Unified)
SDF 11 (U)	Eleventh Cycle of the Special Development Fund (Unified)
SDGs	Sustainable Development Goals
SO	Strategic Objectives
SPS	Strategic Partnership Strategy
SSD	Social Sector Division
STL	Saint Lucia
SUR	Suriname
SVG	St. Vincent and the Grenadines
TA	Technical Assistance
TDD	Terminal Disbursement Date
TOR	Terms of Reference
UOF	Use of Funds
US	United States of America
USAID	United States Agency for International Development
VPO	Vice-President (Operations)
WB	World Bank

BNTF PROGRAMME PROJECTS AND SUB-PROJECTS

Programme	All activities – Regional and National
Project	Participating Country National Activities
Sub-Project	Single National activity meeting BNTF selection criteria

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PROGRAMME SUMMARY

Financial Terms and Conditions		
Grantees: Barbados, Belize, Commonwealth of Dominica, Grenada, Republic of Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname.	Type of Funding: Project Grants to 10 Borrowing Member Countries (BMCs) and Use of Funds (UOF)	Implementation Period: June 2025 to December 2028
Implementing Agencies (IA): National Entities	Disbursement Period for Country Grants: September 30, 2025 to December 31, 2028	
Source:	Amount (\$'000)	
Special Development Fund 11 (Unified) [SDF 11 (U)] Basic Needs Trust Fund Eleventh Programme (BNTF 11)	46,000	
Counterpart from 10 BNTF Participating Countries (PCs)	7,646	
TOTAL:	53,646	
Programme Outcome/Description: <p>Within PCs, the Basic Needs Trust Fund (BNTF) Programme is referred to as a Country Project or a Project, which is managed by an Oversight Entity (OE). Each PC's Country Project comprises several sub-project interventions and local project management support. At the regional level, the Programme is managed by the Caribbean Development Bank (CDB).</p> <p>The overall expected outcome of BNTF 11 is improved living conditions and quality of life of beneficiaries in selected poor and vulnerable communities in PCs. The Programme will improve access to quality education and training, water and sanitation, basic community access and drainage, and livelihoods enhancement services. To achieve this outcome, the Programme provides resources for the following components:</p> <p style="margin-left: 40px;">Component 1: Country Projects (\$48.646 mn) (Grants, UOF and Counterpart Funding)</p> <ul style="list-style-type: none"> (a) Sub-project Grants (b) Project Management Support (c) Institutional Development (d) Project Monitoring and Evaluation (M&E) (e) Project Implementation Support (f) Transfer Charges <p style="margin-left: 40px;">Component 2: Regional Coordination: (\$5 mn) (UOF)</p> <ul style="list-style-type: none"> (a) Programme Management Support (b) Programme Implementation Support (c) Programme M&E 		

Gender Marker Summary:						
Gender Marker	Analysis	Design	Implementation	M&E	Score	Code
Score	1.0	0.5	1.0	0.5	3	GM*

* Gender Mainstreamed (GM). The BNTF 11 Programme has the potential to contribute significantly to gender equality.

1. **BACKGROUND**

1.01 The Basic Needs Trust Fund (BNTF) is a cyclical Programme that was launched in 1979. It is the main grant-funded Programme of the Caribbean Development Bank (CDB) for pursuing poverty reduction and social resilience in its Borrowing Member Countries (BMCs). Appendix 1.1 indicates BNTF's contribution to CDB's Social Resilience Pillar). The Programme targets the poor and vulnerable, through a community development modality that aims to improve the lives and livelihoods of beneficiaries in Participating Countries (PC) by improving basic economic and social infrastructure and services, and increasing opportunities for economic activity through skills training, capacity-building and institutional development support. The Programme is distinguished by its gender-responsive, community-targeted, demand-led participatory approaches to the engagement of vulnerable segments of the society for sustained people-focused development, within the strategic sector priorities as defined by the respective PCs. It is built on the premise that the population consists of different groups with varying needs and priorities. In this regard, gender equality and social inclusion anchor the Programme ensuring that basic needs are met with a clear focus on disadvantaged people in communities including women, youth, persons with disabilities (PWDs) and indigenous people.

1.02 As of December 2024, nine BNTF cycles have been implemented with a cumulative total of approximately \$337.1 million (mn) in funding for 2,882 sub-projects which directly impacted the lives of more than three million men, women, and children. Appendix 1.2 provides details of each BNTF phase to date. The current Programme, BNTF Ten (10), was allocated \$40 mn from the Special Development Fund (SDF)10 in April 2021. BNTF 10 is still under execution mainly due to the negative impact of the COVID-19 pandemic and other external shocks and natural hazards that have impacted programme implementation, project staff, key stakeholders, and beneficiaries. The expected completion date is June 2026.

1.03 Under the revised “composite score methodology” as outlined in the Resolution and Report of Contributors to Special Development Fund (SDF) 11, BMCs listed in CDB's Group 2¹ are automatically eligible to participate in the BNTF Programme. The Cooperative Republic of Guyana and Montserrat, currently participating in the BNTF 10 Programme, now classified as Group 1 countries, have been granted access to BNTF Eleven (11) resources. Despite the growth in the petroleum industry in Guyana, significant pockets of poverty remain in the rural and hinterland regions. Due to its small population and low level of economic activity, Montserrat continues to be supported under the Programme. In addition, Barbados has been categorised as a Group 2 BMC, making it eligible for inclusion in the BNTF Programme.

1.04 The proposed design of BNTF 11 builds on the foundation of BNTF 10, while introducing key reforms to enhance its effectiveness and impact. These reforms were based on the agreed recommendations to improve efficiency, effectiveness, relevance, and value for money outlined in the Management Response to the Mid-Term Evaluation (MTE) of the BNTF 10 Programme (Paper BD 101/23), the Updated Management Response to the Conclusions and Recommendations of the Mid-Term Review of the (SDF) Tenth Cycle (Paper BD 1/24), the Multicycle Evaluation of SDF 8 and 9 and consultations with PCs. In addition, preliminary findings of the Programme Completion Report (PCR) for BNTF's ninth cycle (BNTF 9) and Country Project Reports also informed the proposed enhancements. Staff reviewed and revised the processes and modalities that Programme assessments identified as obstacles to effective Country Project implementation.

1.05 SDF Contributors continue to be supportive of the BNTF Programme, which promotes the Bank's commitment to achieving the objectives of its Strategic Plan Update 2022-2024 and the United Nations' (UN) Sustainable Development Goals (SDGs), particularly no poverty (SDG 1), quality education

¹ Contributors to SDF 10 approved the continued use of country groupings as established for SDF 8. Only BMCs categorised as Group 2 are automatically eligible for participation in the BNTF Programme.

(SDG 4); clean water (SDG 6), decent work and economic growth (SDG 8), reduced inequalities (SDG 10); sustainable communities (SDG 11) and partnerships (SDG 17) for the Goals.

2. STRATEGIC CONTEXT

MACROECONOMIC AND SOCIAL CONTEXT

2.01 The COVID-19 pandemic caused an 8.7 percent (%) decline in BMC's regional output in 2020. Recovery efforts led to 4.7% growth in 2021 and 9.8% in 2022. However, the recovery's momentum has moderated, averaging 7.7% between 2023 and 2024, and is expected to average 7.1% through to 2026. With expanded oil production, Guyana's economy contributed an average of 19.8% to regional output between 2023 and 2024 and is projected to contribute an average of 26.7% through 2026. Excluding the rapidly expanding Guyana economy, regional growth averaged 2.1% between 2023 and 2024 and is projected at 2.2% by 2026.

2.02 Across PCs, growth is limited by factors such as heavy reliance on tourism and energy imports, high debt, and adverse weather conditions. Despite declining unemployment, labour market disparities persist, including gender gaps in participation and unemployment, as well as high youth unemployment and under-employment. Temporary and, more significantly, structural factors undermine employment outcomes, such as skills mismatches within the economy and elevated reservation wages. Meanwhile, inflation, particularly in food, remains a concern. Although easing, high food costs and supply chain issues keep inflation elevated, disproportionately impacting the poor and vulnerable. Accelerated economic transformation and human development initiatives are therefore essential to improve upon the levels observed pre-COVID-19.

2.03 The macroeconomic landscape of BMCs is challenging. As Small Island Developing States, BMCs have substantial development needs and are disproportionately affected by climate change (CC) and global economic and financial shocks. The Caribbean's ties to the United States (US) in trade, tourism, remittances, and foreign relations expose the region to shifts in US policy. Tariffs and mass deportations by the US could constrain Gross Domestic Product (GDP) and employment while increasing inflation and fiscal pressures in BMCs. The recent shift in US foreign development assistance priorities is already affecting the Caribbean, with reductions in funding and technical assistance (TA) from the United States Agency for International Development (USAID) and other US agencies, posing significant hurdles. Funding gaps and disruptions to disaster preparedness, social services, and other development initiatives are being experienced, emphasising the urgency to adapt. This highlights the region's vulnerability to changes in foreign aid policies and underscores the need for greater independence and sustainability in development planning. The challenges present opportunities to seek alternative or additional financing, ensuring the continuity of critical development initiatives like the BNTF.

2.04 Securing grant funding through the BNTF 11 is crucial for addressing basic infrastructure and social service needs. High public debt, limited revenue streams, and economic shocks impact investment in essential sectors such as healthcare, education, transportation, and utilities. Without adequate external financial support, critical infrastructure projects may remain non-existent or underdeveloped, stifling economic growth and social progress. Additionally, with high unemployment, poverty, and inadequate access to essential services, grants ensure that healthcare facilities, educational institutions, and community welfare programmes can operate effectively without adding financial strain on governments. BNTF 11 can therefore empower beneficiary countries to build long-term resilience, foster sustainable development, and enhance the overall quality of life for citizens, making them indispensable in tackling both immediate and long-term economic challenges. See Appendix 2.1 for the details of the Macroeconomic context.

Social Context

2.05 The BNTF Programme covers a significant proportion (23.8 %) of the population across the Bank's BMCs, accounting for just over 4.5 million individuals according to 2023 data from the UN. Approximately 70% of the population in PCs is under 55 years of age, with the 0 – 14 and 25 – 54 age cohorts representing the largest cohorts, indicating a young population with a bulging working population. However, BMCs have also registered a decline in the working age population over the last two decades. There is urgent need to capitalise on the demographic dividend afforded by the numbers of youth and those of working age. Strategies include investment in human capital; enhancing labour market mobility; provision of opportunities for decent work and reducing barriers for the female labour cohort.

2.06 The Human Development Report (2024/25) shows a general upward trend in the Human Development Index (HDI)² across the region, which is in keeping with global improvements following the COVID-19 pandemic. Overall, PCs continued to perform well on the composite index, relative to other countries, with Barbados, St. Kitts and Nevis and Trinidad and Tobago achieving Very High Human Development status and all others, attaining High Human Development status. In terms of the Gender Development Index PCs attained high gender equality in HDI achievements between women and men.

2.07 Notwithstanding human development strides, the Sustainable Development Goals Report 2024 shows a significant slowdown in progress, especially in poverty reduction in the region. Official poverty data for the Caribbean region collected prior to the COVID-19 pandemic, under CDB's Enhanced Country Poverty Assessment Programme³, revealed that the proportion of the population in poverty exceeded 20% (at 21.1%) with Haiti excluded from the figure. With the inclusion of Haiti, poverty figures for the Region stood at 44.1%. The proportion of the Caribbean population below the indigence line (food poverty) stood at 22.4%, including Haiti, and 11.1% excluding Haiti.

2.08 More recently, monetary poverty and inequality estimates for two Caribbean countries, Jamaica and Suriname, in the post-pandemic period, revealed an 18% poverty rate for Suriname in 2022 and a poverty rate of 14% for Jamaica in 2021. There is significant inequality in monetary welfare across the Caribbean. The Gini Coefficient (index) lies close to or above the WB threshold of 40 Gini points for high inequality countries⁴; moreover, inequality is high in the Caribbean compared to other upper-middle-income countries.

2.09 Poverty is typically caused and sustained by multiple interrelated deprivations and vulnerabilities. Available multidimensional poverty data for five BMCs reveal a multidimensional headcount poverty of 42.1%⁵; these countries have a multidimensional poverty intensity of 45.1%, indicating that those who are

² The HDI is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and having a decent standard of living.

³ These countries include Belize, Grenada, Saint Lucia, St. Vincent and the Grenadines, and St. Kitts and Nevis. Post COVID-19, BMCs undertaking poverty assessments with the support of CDB and development partners including the Inter-American Development Bank, World Bank and the Oxford Policy and Human Development Initiative, under CDB's Enhanced CPA Programme include Barbados, Jamaica, and Turks and Caicos Islands. CDB is awaiting the decision from the newly-elected Government of Trinidad and Tobago regarding next steps in undertaking monetary and multidimensional poverty analysis of the Survey of Living Conditions-Household Budget Survey. In addition, discussions are ongoing with the Government of the Commonwealth of the Bahamas regarding CDB's support in undertaking poverty analysis.

⁴ According to the International Monetary Fund (IMF), the average Gini coefficient for Caribbean countries is approximately 47.3, placing the region among the most unequal globally. In contrast, the median Gini coefficient for upper-middle-income countries worldwide tends to be lower, often ranging between 30 and 40 (IMF Working Paper entitled, *Income Inequality in Small States and the Caribbean: Stylized Facts and Determinants*).

⁵ Source: Multidimensional Poverty Measurement from Available Surveys and Census Data in five OECS Countries prepared for the Enhanced Country Poverty Assessment Programme (not published).

multidimensionally poor experience, on average, close to half (45%) of the possible deprivations⁶. Households with children, youth, PWDs and the elderly are among those disproportionately represented among the most vulnerable and poorest.

2.10 Countries continue to face diverse and complex economic and social conditions that limit job creation and labour demand and constrain economic inclusion. The International Labour Organisation's (ILO) 2023 Labour Overview reports an average unemployment rate of 6.2% in Latin America and the Caribbean (LAC) —matching pre-pandemic levels. In the Caribbean, rates range from lows of 3.5–3.6% in Jamaica to a high of 11.7% in Saint Lucia. However, the ILO notes that while employment rates have recovered, labour markets remain affected by persistent structural issues as such as: (a) participation rate gender gaps - with women registering at 23% lower than that of men - and unemployment rates at or about 22% lower; (b) high youth unemployment at 18.1% in 2023; (c) increased informality, and (d) a lag in rural employment as compared to urban employment.

2.11 Despite significant progress across a number of social and human development indicators, high rates of poverty and inequality remain pressing development challenges. Human development aligns with the SDGs, which aim for long-term progress. It centres on improving the quality of life, ensuring equal opportunities, and empowering individuals, especially the most vulnerable, to reach their full potential. However, only 22% of SDG targets in LAC are on track to be met by 2030, while 46% are progressing too slowly, and 32% will be missed entirely.

2.12 BNTF 11 will play a crucial role in helping PCs to recover lost ground and to propel them to achieve very high human development. With its focus on human development, PCs will be supported in strengthening their approach to health, education and income, which are fundamental to human well-being. The multi-faceted impacts of the unprecedented economic and social crises such as, the pandemic, natural hazard impacts including volcanic eruptions, hurricanes and tropical storms – predicted to increase in frequency and intensity – and flooding, have shown that a comprehensive social protection system, including income support and safety net, and active labour market programmes, is required. It must be adequately and sustainably financed, or else large segments of the population in PCs, particularly those in the lower-income quintiles, will remain vulnerable to poverty and diminished quality of life and well-being.

Food and Nutrition Insecurities

2.13 The Caribbean faces a complex web of challenges to food and nutrition security. The COVID-19 pandemic, coupled with CC and other crises, has severely impacted the region, leading to significant socio-economic and environmental disruptions. According to the United Nations Children's Fund (2023), a staggering 52% of the population in the English-speaking Caribbean, or approximately 3.7 million people, were considered food insecure in 2023. The high cost of healthy diets compounds this alarming figure. The State of Food Security and Nutrition in the World 2024 report reveals that the average cost of a healthy diet in the Caribbean is \$5.16 per person per day, significantly exceeding both the global average (\$3.96) and the regional average for LAC (\$4.56). These elevated costs exacerbate food insecurity, particularly for vulnerable populations, and hinder efforts to improve nutritional outcomes.

2.14 Furthermore, the region grapples with rising food prices, limited access to safe and affordable local produce, and heavy reliance on food imports, leaving the Caribbean vulnerable to global price shocks and supply chain disruptions. There is also a high prevalence of non-communicable diseases linked to dietary factors. The agricultural sector, crucial for regional food security, has suffered significant setbacks due to climate change and natural hazards, including frequent hurricanes, droughts, floods, and rising sea levels,

⁶ The MPI is based on 20 indicators across five dimensions as follow: health; education; employment; living standards and security; and environment and climate change vulnerability.

which have disrupted production, damaged infrastructure, and eroded livelihoods, impacting food availability and increasing food insecurity. Given that several BMCs import over 80% of their food, it is imperative that the region achieves true food self-determination. This underscores the urgent need for enhanced food sovereignty, empowering communities and BMCs to control their own food systems, thereby reducing exposure to external vulnerabilities.

2.15 Despite these challenges, regional efforts to increase the production and distribution of safe and healthy food have been advanced by regional organisations, development partners, and BMCs. CDB, guided by its Agricultural Sector Policy Strategy (ASPS) 2020, has implemented a multifaceted approach to support these efforts. Key interventions include investing in climate-smart agriculture, improving access to and management of water for agriculture and enhancing access to technology and inputs for farmers. Strengthening the agrifood value chain requires improving transportation, storage and processing infrastructure, reducing post-harvest losses, facilitating regional market access and increasing intraregional trade. Encouraging the production of nutritious crops, supporting local food systems, diversifying livelihoods within rural communities, investing in agricultural human capital, particularly among women and youth and other vulnerable groups, and strengthening regional agricultural extension services are also paramount. Lastly, implementing robust risk management strategies - insurance mechanisms and social safety nets, is crucial to protect actors within the agricultural value chain, thereby strengthening the region's food and nutrition security.

POVERTY RESPONSE

2.16 CDB has a comprehensive framework of policies and strategies - including: the Education and Training Policy and Strategy, Youth Policy and Operational Strategy, the Disaster Risk Management Strategy and Operational Guidelines, the ASPS, the Gender Equality Policy and Operational Strategy, the Social Protection Framework as well as seminal work conducted with PWDs - which guides the BNTF response to these challenges. In addition, BNTF continues to employ its Youth Employment and Empowerment Framework to guide interventions targeted at vulnerable young people and geared towards enhancing positive attributes and assets.

2.17 As the Bank's flagship Programme for, and a vanguard of poverty reduction, BNTF 11 will maintain its priority areas – Education and Training, Livelihoods Enhancement; Basic Community Access and Drainage; and Water and Sanitation Systems. Work in these areas will be predicated on, *inter alia*, resilience-building, disaster reduction and management, CC adaptation, environmentally sustainable development, capacity and capabilities enhancement, gender equality and social inclusion informed by intersectionality, labour market sensitivity, innovative and motivated leadership, and strong governance and institutional frameworks.

2.18 In its response to poverty across its PCs, BNTF 11 will consider the vexing and emerging challenges which characterise and further inform the development landscape. Poverty reduction mechanisms will seek to address systemic problems and rapidly emerging and alarming trends to safeguard the well-being and build the resilience of those whose lives are affected by poverty, vulnerability and inequality.

2.19 The sector analyses which can be found in Appendix 2.2 provide the context that frames the environment within which BNTF operates.

3. REVIEW OF BNTF 9 AND 10 PERFORMANCE

BNTF 9 and 10 Performance

3.01 Independent consultants are preparing the PCR for BNTF 9, which was approved on March 16, 2017, with a terminal disbursement date (TDD) of December 31, 2020. While the Programme was on track by April 2020, COVID-19 caused significant delays, halting activities in all PCs for several months. As a result, the TDD was extended to December 31, 2022, allowing for the completion of sub-projects. Delays in country project reports also postponed the BNTF 9 PCR.

3.02 The BNTF 10 Programme is ongoing and is expected to be completed by June 30, 2026. Cumulative disbursement as of April 30, 2025, is \$25.337 mn, representing 70.4% of available resources (See [Appendix 3.1](#)). Resources from the BNTF 10 Programme were used to engage consultants to assist PCs in completing the update to the CPF for the BNTF 11 Programme. Preparation has commenced with an expected completion date of August 2025.

3.03 BNTF 10 ushered in several enhancements, including:

Livelihoods

3.04 BNTF strengthened its livelihoods approach in response to strong regional demand and its impact on vulnerable groups. BNTF 10, funded 14 subprojects totalling \$4.4 mn, which are expected to benefit over 5,800 people. Projects are expected to support small-scale farmers, artisans, and service providers, with a focus on sustainable agriculture, creative industries, and enterprise support for PWDs and at-risk youth. Implementation is still ongoing for most of these subprojects, due to delays and increased costs resulting from COVID-19. There is a need for continuous updating of the livelihood assessment and finalisation of the Livelihoods Guidance Note.

Youth Engagement and Empowerment

3.05 BNTF 10 applied its Youth Empowerment Framework to support at-risk youth, piloting a Programme in Saint Lucia that trained 32 individuals in Fashion Design and Music Business. Twenty received grants to start or expand businesses. Delivered in conjunction with the Cultural Industries Investment Fund, the initiative demonstrated strong potential for future collaboration. A follow-up study revealed that 90.5% of participants had a positive experience, with all participants being either employed or self-employed; however, the income gains were modest. The pilot confirmed the model's relevance but underscored the need to strengthen implementation capacity.

Community Development Strategy

3.06 BNTF 10's Community Development Approach (CDA) focused on empowering communities through inclusive, data-driven planning, guided by the International Organisation Advancing the Practice of Public Participation public participation model. A 2023 pilot in Guyana, Jamaica, and Saint Lucia assessed 22 community groups, leading to targeted support such as grant writing workshops with Caribbean Disaster Emergency Management Agency, engagement training, and a free online course to be launched in August 2025.

3.07 Under BNTF 11, the CDA will continue to utilise the KoboToolbox⁷ for capacity assessments, portfolio mapping and building partnerships with national agencies and civil society organisations. Best practices will be documented and shared across the region.

Partnership Strategy

3.08 In Cycle 10, BNTF laid the groundwork for a formal Partnership Strategy in Cycle 11, focusing on its role as a convener and capacity builder. Through stakeholder mapping and strategic dialogue, BNTF turned ad hoc collaborations into structured partnerships, mobilising over \$650,000. This included a Proposal Writing Workshop that trained 300+ leaders and resulted in six funded proposals. BNTF also invested \$150,000 in KoboToolbox training for 14 BMCs, supporting digital monitoring which was adopted by several agencies. A media partnership expanded visibility to 4.8 million people, and BNTF co-hosted a Poverty Reduction Symposium with the African Development Bank and the WB.

3.09 Partnerships advanced vocational training, school infrastructure, and financial literacy through a programme with Jamaica National Foundation and Canada's Local Engagement and Action Fund for 200 civil society organisations. For Cycle 11, BNTF aims to finalise the Partnership Strategy and Toolkit and secure two major regional partnerships to scale its impact

Knowledge Management, Communications, and Visibility

3.10 BNTF 10 boosted visibility with 16 press releases and 14 videos since 2023. Eighteen participants were trained in CANVA, producing five videos on BNTF 9 sub-projects and increasing social media content, particularly on Facebook. Digital presence expanded with the launch of new websites in Saint Vincent and Grenada, and active social media platforms expanded with 8 of nine countries having updated Facebook pages). Global awareness days were observed in 2023-2024, and BNTF was showcased at regional events like the Jamaica and Trinidad & Tobago symposia.

3.11 A November 2024 workshop built Knowledge Management Communication (KMC) capacity for 22 participants, leading to nine draft national KMC strategies and one regional strategy for BNTF 11.

Building Social Capital

3.12 BNTF 10 focused on community engagement, trust, and capacity-building, empowering leaders and IAs to advocate for local needs. Training helped secure \$186,000 for five projects and enhanced monitoring skills for 75 leaders across 15 countries, utilising KoboToolbox. Partnerships with the private and public sectors helped formalise community groups as civil society organisations, boosting collaboration, resilience, and sustainable development.

Enhancing Gender Equality

3.13 BNTF 10 initiated the creation of Gender Action Plans (GAP) for country projects. A workshop, held from May 30 to June 2, 2023, strengthened the capacity of 11 Community Liaison Officers (CLO) to design these plans and address gender gaps. This led to the implementation of gender-focused interventions

7 Under BNTF 10, Kobotoolbox online data collection platform was introduced to improve data collection for intervention design, project implementation and evidence-based decision making. Several Kobotoolbox training sessions were implemented in collaboration with Kobotoolbox and the World Bank to enhance the online data collection capacity of BNTF project teams, disaster management and community development professionals. A joint portfolio mapping exercise will be executed in partnership with the World Bank to map poverty reduction projects and the associated impacts across the nine BNTF PCs.

under BNTF 10, particularly in raising awareness and changing social norms, such as in education and gender-based violence. GAPS will be a feature of the BNTF 11 Programme.

3.14 Details of the performance of BNTF 9 and 10 and initiatives undertaken to build capacity in various areas are outlined in Appendix 3.2.

LESSONS LEARNED INCORPORATED INTO PROGRAMME DESIGN AND OPERATIONS

3.15 The BNTF 10 MTE pointed to lessons learned that are consistent with CDB's experience in implementing community development projects, especially over the last three phases of the BNTF Programme. To optimise the programme's performance and implementation rate, the following key lessons and action areas will be integrated into the design and operation of BNTF 11.

- (a) **Implementing Agency (IA) engagement in Programme Design:** IA staff demonstrate a high level of commitment to BNTF goals; however, because they are not effectively engaged in the Programme Preparation Phase, particularly the design phase, before drafting of the Staff Report their buy-in to some aspects of the Programme may be weakened and this may negatively affect their performance and be a missed opportunity to enhance the design and practical application of proposed changes.
- (b) **IA capacity/capacity- building:** BNTF must increase its current efforts to build social capital through capacity-building among beneficiary groups, within ministries of community development, IAs and Oversight Entities (OEs) to improve collaboration and strengthen resilience for sustainable development.
- (c) **Budgetary implications of new features:** Effective implementation of new key priorities, such as the focus on environmental sustainability, CC resilience, and disaster risk management, is best achieved through a review of the cost implications, with revised allocations included in the budget as deemed necessary.
- (d) **Results Management is important for ensuring the effectiveness and impact of results, particularly in small community-driven interventions such as BNTF.** BNTF OP365 is the system for results management; however, a risk management assessment/monitoring reporting and dashboard will be developed with resources from the regional component of the programme to allow for more timely data and analysis of new and realised risks and facilitate prompt decision-making for CDB and IA. There is a need to enhance the capacity for results monitoring and generally inculcate a culture of managing for results among PCs and CDB BNTF.
- (e) **The small size of BNTF sub-projects attracts contractors with limited ability to address social and environmental safeguard requirements, which can impair project implementation and results.** As such, there is a need in BNTF 11 to build the capacity of contractors to adequately address environmental and social safeguard requirements in sub-project bids and execution. An opportunity exists to work with the Caribbean Technical Consultancy Services, which will be pursued in Cycle 11, to deliver targeted training and technical assistance that strengthens contractor capabilities in these critical areas.

LINKAGE TO CDB'S STRATEGIES AND POVERTY GOALS

3.16 The Programme is designed to address the multidimensional nature of poverty by enhancing access to essential services and opportunities for vulnerable groups, including youth, women, PWDs, and the elderly. It is grounded in the principle of leaving no one behind and is aligned with efforts to achieve the SDGs by 2030. The principle emphasises inclusion, equity and prioritising the most vulnerable populations.

3.17 Three Strategic Objectives (SOs) of CDB's Strategic Plan Update 2022–2024 of building social, environmental and production resilience, are closely aligned with the Bank's mission of "Reducing poverty and transforming lives through resilient, sustainable, and inclusive development." The Programme will play a key role in advancing this mission by supporting the design and implementation of sub-projects aimed at improving the quality of life for the most vulnerable and at-risk populations across the ten beneficiary countries.

3.18 The Programme will continue to deliver social and economic infrastructure, human resource development, and livelihood enhancement services across local, national, and regional levels. Its design is guided by the four core principles underpinning CDB's SOs:

- (a) Maximising value for money by promoting additionality, achieving measurable impact, and leveraging digital transformation.
- (b) Maintaining selectivity and focus while ensuring alignment with broader development goals.
- (c) Strengthening country-level engagement and deepening collaboration with stakeholders.
- (d) Providing integrated and comprehensive development solutions.

3.19 The Programme is also consistent with CDB's policies and operational strategies, namely: Education and Training; Agriculture and Rural Development; Gender Equality; Youth and CDB's Social Development Framework. SDF 11 addresses the SDGs, and BNTF 11 is aligned with SDF's two key corporate strategies: building resilience and transforming lives.

RATIONALE

3.20 The regional development landscape faces serious challenges due to globalisation, stymied economic growth attributed to lingering and inflationary effects of the COVID-19 pandemic, restricted fiscal capacity, and susceptibility to natural hazards and CC. Consistently high levels of vulnerability, monetary and multidimensional poverty, and inequality persist among PCs limiting job creation and labour demand and constraining economic inclusion. Unemployment, particularly youth unemployment, remains a significant issue. The region also faces a complex web of challenges to food and nutrition security with 52% of the population in the English-speaking Caribbean, or approximately 3.7 million people, being considered food insecure in 2023 by UNICEF. This alarming figure is compounded by the high cost of healthy diets.

3.21 Education in the Caribbean has undergone a progressive journey, marked by significant achievements and ongoing challenges. Inequitable access to quality ECD services and tertiary education, poor quality of infrastructure and teaching, and inefficiencies in resource use, remain critical constraints. There is a continuing mismatch between skills needed for a twenty-first century economy and society, including employability skills and critical thinking. High dropout rates are a significant issue, with boys more likely to leave school early compared to girls. Traditional teaching methods often fail to engage boys, leading to higher rates of disengagement and lower academic performance. Gender stereotyping in subject selection persists, and high youth unemployment coexists with skills shortages in several key areas such as

ICT, construction and related activities, healthcare, modern agricultural practices including agribusiness, and entrepreneurship.

3.22 Infrastructure investment gaps in PCs have detrimental effects on residents' living conditions and quality of life. Data on SDG 6 (clean water and sanitation) for 2022, for the Caribbean, indicate that 93% of the population of the ten beneficiary PCs, uses safely managed drinking water services. There is a higher percentage coverage in urban areas when compared to rural areas. The proportion of the population using safely managed sanitation services has been estimated at 71% (2023) with lower coverage in rural than urban areas within PCs. However, there are also pockets of communities within urban areas which remain without sanitation services, most of which are informal settlements. In many of these communities, residents discard waste directly into open lots and drainage systems.

3.23 The transport sector plays a critical key role in the economic and social development of the region and whilst there has been progress, the lack of integration, connectivity and resilience to CC impacts can constrain wider economic growth. The poor condition of rural roads presents mobility and accessibility challenges for users. Farmers incur significant losses due to difficulty in accessing their farms and damage to harvested crops while transporting them over uneven access roads to the market. They also pay higher prices for the transportation of their produce due to the reluctance of transportation providers to traverse these roads.

3.24 The lack of investment in critical infrastructure leads to inadequate access to essential services, including education, especially early childhood education, as well as basic community resources such as safe drinking water, sanitation and community roads. PCs also suffer from low human and social capital development and restricted livelihood opportunities. Particularly vulnerable are the youth (mainly males), who are at risk of becoming perpetrators or victims of violent crimes, which undermines community cohesion and citizen security.

3.25 The BNTF 11 Programme promotes key elements of social protection by facilitating access to essential socio-economic infrastructure and social services. Its primary focus is on poor and vulnerable populations across PCs. These target groups include individuals in the lowest income quintiles, as well as the elderly, youth, PWDs, individuals with special needs, the unemployed, and the underemployed, particularly youth and women. Additionally, the programme supports indigenous communities who disproportionately experience social exclusion and lower human development outcomes.

3.26 BNTF holds a distinct comparative advantage in the Region for delivering poverty-reducing, small-scale social and economic infrastructure, as well as community development initiatives. This advantage stems from its effective targeting of poor communities, strong regional presence, integrated social sector investments, use of participatory development approaches, partnerships with governments, the private sector and other key stakeholders, and strong emphasis on country ownership.

PROPOSED CHANGES IN BNTF 11

3.27 Programming for BNTF 11 will be guided by the reforms introduced under BNTF 10, the recommendations from the MTE and PCR for BNTF 9, BNTF 10 MTE, and lessons learned during BNTF 10 implementation. The Programme will continue to focus on initiatives in the area of livelihoods and economic empowerment, particularly targeted towards women and youth.

3.28 The Country Policy Framework (CPF) update is the very first activity undertaken by PCs and is necessary to operationalise Country Project resources in the new phase. The CPFs, which provide a pipeline of prioritised potential sub-projects, were finalised some 12 to 24 months after BNTF 10 was approved. To improve this performance, BNTF 10 resources have been used to update CPFs for BNTF 11 so that CPF

approvals will more closely coincide with the date of approval of BNTF 11. As of April 31, 2025, all CPFs were under preparation and will be completed by August 2025.

3.29 The changes summarised below aim to improve the Programme's visibility, monitoring and reporting on programme results, accountability, and compliance with CDB's Environmental and Social Review Procedures, procurement policy and procedures, governance, and rate of implementation for timely delivery of project benefits:

- (a) **Enhancing Programme visibility and knowledge management** with the Regional KMC Strategy as well as the individual country KMC strategies developed and promoted under BNTF 10, through consistent dissemination of press releases, lessons learned and best practice videos, as well as attendance at key regional symposia and seminars. The BNTF 11 Programme is poised to see strengthened visibility and knowledge management which will include the creation of communications material and assets for CDB's website and social media channels. Over the first two years of implementation, the capacity of all ten IA's will be strengthened around online and digital visibility through continuous training in alignment with CDB's overall communication strategy. By the MTE, there will be at least one regional workshop, four training webinars, a toolkit with working templates, at least one media partnership per country and systematic generation of social and traditional media content.
- (b) **Increased Partnership Engagement.** BNTF 11 will embed dedicated partnership focal points within Implementing Agencies and launch pilot interventions to mobilise co-financing, broaden community reach and formalise strategic alliances through formal Memorandum of Understandings (MOUs) and TA frameworks aligned with national priorities, thereby enhancing social resilience. Concurrently, BNTF 11 will pursue regional collaborations with entities operating across multiple Programme Countries, securing at least one new strategic partnership in five PCs by the MTE and one in every PC by the end of the Cycle. BNTF will also establish at least one regional partnership spanning two or more PCs to leverage cross-border expertise and resources, and initiate at least one pilot sub-project with local and regional partners to test and refine a replicable collaboration model. Measuring Social Return on Investment (SROI) for partner engagement is essential, as it quantifies the social impact of these collaborations, guides strategic decision-making throughout partnership development, and accordingly BNTF will embed a SROI measurement tool in all partnership MOUs and TAs.
- (c) **Improving the monitoring, evaluation and reporting** by engaging a Monitoring & Evaluation (M&E) Specialist within the CDB BNTF Team by Q1, 2026, with M&E responsibility for the entire Programme. The timelines and quality of monitoring and reporting is expected to improve by MTE.
- (d) **Strengthening the capacity of IA and Project Monitoring Committees (PMCs)** by providing additional support as may be required to improve procurement procedures and Project management. BNTF will utilise new simplified Standard Bidding Documents in Dominica, Grenada, Saint Lucia and St. Vincent and the Grenadines and e-procurement systems in countries such as Grenada, Jamaica and Saint Lucia, with Belize scheduled to go live by November 2025.
- (e) **Strengthening Contractor/Consultant capacity** to implement projects by enhancing their ability, with technical support from the Environmental Sustainability Division (ESD), the Social Sector Division (SSD) and the Procurement Policy Unit (PPU), in managing and

ensuring compliance with CDB's Environmental and Social Review Procedures (ESRP) and procurement policy and guidelines. Accordingly, BNTF will collaborate with PPU, ESD and SSD to conduct Procurement Fairs in the 10 BNTF PCs by December 2026. The procurement fairs aim to (a) enhance Contractors' awareness of procurement opportunities for projects funded by CDB, (b) provide training to Contractors to better understand CDB procurement policy and guidelines, specifically, preparation of bid documents, and pricing and bid evaluation criteria, and (c) familiarize Contractors in the bidding process of their obligations to implement CDB's Environmental and Social (E&S) (including gender and health and safety) requirements. The E&S requirements in the bid document include the Code of Conduct, Management Strategies and Implementation Plans which forms the Contractor's Environmental and Social Management Plan (C-ESMP), E&S compliance and E&S Metrics for monitoring and reporting. Further, by the MTE, BNTF will, with support from ESD and SSD seek to ensure that a minimum of one environmental and social safeguards training and awareness session on 'monitoring, compliance and reporting on E&S matters during implementation' is conducted. The training will target the sub-projects' supervision consultants and contractors in each of the PCs. In addition, the three online training modules being developed under BNTF 10, geared towards (a) gender analysis in community development projects, (b) GBV prevention and response in community development projects, and (c) GBV prevention and response sensitisation for contractors, will be conducted during the fourth quarter (Q4) of 2025.

- (f) **The early engagement of technical consultants** during Q3 2025 to Q1 2026 to provide preliminary design reports, including realistic cost estimates to facilitate the appraisal of sub-project interventions. This is expected to advance implementation of infrastructure sub-projects by shortening the period between appraisal and construction by six to eight months. Applying this approach to our BNTF Implementation Schedule, the earliest commencement date for construction is March 20, 2026, leaving approximately 33 months to complete infrastructure sub-projects.
- (g) **Strengthening the capacity of IAs, co-implementing agencies, and other key stakeholders to manage, implement, monitor, and evaluate livelihood interventions** through capacity-building and engagement activities, including access to Preparation or Implementation Specialists. By the end of the MTE, the guidance note on Livelihoods Enhancement for BNTF PCs will be finalised and livelihoods sensitisation workshop will be completed covering all PCs. Training in livelihood assessment and completion of an additional three livelihoods assessments will also be carried out within that time frame. These and other targeted actions will improve the capacity of key stakeholders to more effectively implement, monitor and evaluate livelihoods interventions.
- (h) **Increase the upper limit for special sub-projects from \$1.0 mn to \$1.2 mn for the BNTF 11 Programme**, taking account of post-COVID inflation, increases in scope to address higher performance specifications, sector-specific requirements, enhanced environmental and social safeguards and information technology.

3.30 The proposed changes are expected to strengthen the pace and quality of project implementation, improve knowledge management, leverage private sector resources and enhance results management.

4. THE ELEVENTH PROGRAMME

4.01 BNTF 11 will continue its focus on the three priority areas identified under BNTF 10, namely basic Education and Human Resource Development (EHRD); water and sanitation services enhancement; and

basic community infrastructure, access and drainage improvement. The Programme will place an increased emphasis on livelihoods enhancement with a particular focus on at-risk youth. The Programme will support a socially inclusive development process that empowers the poor and vulnerable and strengthens institutional development in ten PCs *viz.* Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname. In the case of Barbados, which became eligible for participation in BNTF 11, CDB's approach to the operationalisation of BNTF will be to:

- (a) Assess the governance and institutional framework through which BNTF programming can be most efficiently and effectively delivered.
- (b) Assess current modalities/frameworks for financing of community-driven interventions to ascertain congruence with the BNTF operational procedures and institutional capacity necessary for effective implementation.
- (c) Agree on a selected framework.
- (d) Enter into a grant agreement with the Government of Barbados to implement pilot sub-projects in such priority areas as early childhood education, rural development, water and sanitation and youth entrepreneurship.
- (e) Undertake a review of the selected operating modality as part of a country completion report.

4.02 Project interventions will integrate relevant SDGs and cross-cutting areas, such as gender equality and environmental sustainability⁸, which enhance the PCs' human development outcomes. Building resilience among the most vulnerable such as youth, women, seniors, children and PWDs will be a central tenet of BNTF 11, ensuring that lives and livelihoods are safeguarded and that protective factors (such as supportive relationships, good problem-solving skills and physical and psychological safety) are cultivated for young people.

4.03 BNTF 11 will seek to maximise digital solutions to improve overall project management and reporting. The Programme will also address the inequalities experienced by the most vulnerable to digital access and services through optimising integration of digital solutions in sub-project interventions.

PROGRAMME OBJECTIVE

4.04 The overall objective of BNTF 11 is to improve the living conditions and quality of life of beneficiaries in selected poor and vulnerable communities in PCs. The Programme will provide resources to increase access to quality education and training, water and sanitation, basic community access and drainage, livelihood enhancement, and human resource development services.

PROGRAMME COMPONENTS

4.05 The Programme has two components, as follows:

- (a) **Component 1 – Country Projects** comprising:
 - (i) **Sub-project Grants:**
 - (1) Investments in a portfolio of eligible sub-projects in at least two of the three core priority areas: EHRD and livelihoods enhancement; water and

8 Inclusive of CC and disaster risk management (DRM).

sanitation systems enhancement; and basic community access and drainage improvement; and

- (2) Investments in cross-cutting areas, such as gender equality and environmental sustainability, including environment, disaster and climate risk management, with specific considerations for maintenance, and effective community engagement and social inclusion. The selection criteria for sub-projects are shown in Appendix 4.1.
- (ii) **Project Management Support:** contribution to operational costs such as project management; support to fiduciary and risk management activities generated by audit reports; hosting/attending capacity building workshops; stakeholder meetings; social marketing, project visibility and communications; partnerships; a revised CPF template; and enabling capabilities for IAs access to CDB's Customer Relationship Management portal (BNTF OP365).
- (iii) **Institutional Development:** short-term consultancies to strengthen capabilities of stakeholder and community institutions, contractors and consultants to address social, gender and environmental safeguards and to assist with the sustainability of results, including the maintenance function in communities.
- (iv) **Project M&E:** implementation of an M&E system for the Project; participatory monitoring activities by the PMC and stakeholders; audits; Country Project Completion Reports and other completion/performance reports; and beneficiary impact assessments. Piloting the use of online data platforms (such as KoboToolbox) to enhance data collection efficiency, monitoring and reporting to enhance BNTF OP365.
- (v) **Project Implementation Support:** technical advisory/consultancy services to support Project activities, including those associated with infrastructure works; education and training, capacity-building, and livelihood enhancement; environmental monitoring; community planning; and local level coordination.
- (b) **Component 2 – Regional Coordination comprising:**
 - (i) **Programme Management Support:** funding for selected administrative costs; project supervision; project launch workshops; training, attachments, preparation of pilots; the integration of cross-cutting areas; partnerships; and programme visibility and communication.
 - (ii) **Programme Implementation Support:** funding for consultancy services for portfolio preparation, including baseline data gathering and the establishment of indicators; strengthening field oversight; quality control and operational processes; strengthening mainstreaming activities; conduct of CPFs; and partnership engagement and knowledge management. Assessments will support institutions and IAs; and the implementation of pilots.
 - (iii) **Programme M&E:** consultancy services and other activities to strengthen systems for internal monitoring through an improved digital system, additional training and improved oversight. Support will be provided for performance audits; case studies; MTE; PCR; and Impact Assessments.

4.06 Details of the Programme components are presented in Appendix 4.2.

ENVIRONMENTAL SUSTAINABILITY, CLIMATE RESILIENCE AND DISASTER RISK MANAGEMENT

4.07 The BNTF Programme is classified as Category “B” based on CDB’s Environment and Social Review Procedures. BNTF 11 focuses on community projects in EHRD, water and sanitation, and access and drainage, which though including civil works aspects, have a limited potential for major adverse environmental or social impacts and/or risks. Such potential risks/impacts can be readily identified and may be site specific or require mitigation and management measures that are readily known and easily addressed. However, if any identified adverse environmental impacts remain unmitigated, it could undermine the sustainability of the sub-project outcomes and present environmental and social concerns including gender and health and safety.

4.08 The most common environmental issues for BNTF sub-projects include pollution from noise, dust and runoff, community and worker health and safety risks, and vulnerability to natural hazards and CC. Environmental and Social Management Plans (ESMPs) for each sub-project will be facilitated by the IAs through consultancy services. These ESMPs will incorporate environmental and social risk management, measures for monitoring and reporting, in keeping with CDB’s Environment and Social Review Procedures (ESRP)⁹ and specific Performance Requirements, and in accordance with relevant national laws and good industry practice. The Contractors will then be required to develop and implement site specific Contractor’s ESMPs (C-ESMPs).

4.09 CC is a major challenge to poverty reduction, and sectors financed by the BNTF Programme are particularly vulnerable to the impacts. For example, prolonged dry spells threaten water supplies, and livelihoods in the agriculture sector; and storms and flooding may impact infrastructure across sectors. Building resilience to CC must therefore be prioritised to ensure the sustainability of BNTF investments.

4.10 BNTF’s 10 sub-projects integrated CC adaptation and mitigation measures through various initiatives, including energy-efficient lighting in building designs, solar-powered lighting for access paths, elevated foundations and improved drainage for flood mitigation, and the promotion of climate-resilient practices such as drip irrigation in farming. These efforts will continue under BNTF 11, with a focus on designing and implementing sub-projects that support CC mitigation and adaptation, disaster risk management (DRM), and environmental management. This approach aligns with the SDF objective of enhancing environmental resilience and contributes to achieving the relevant SDGs. Guidance for strengthening climate resilience in sub-projects and beneficiary communities is at Appendix 4.3.

4.11 Few BNTF PCs operate within a robust national physical planning and environmental regulatory permitting system and even where there are formal requirements, BNTF sub-projects are exempt due to the size of the interventions. Environmental requirements are therefore integrated within the operational and administrative structure of the BNTF Programme. The Guidance Manual: Environmental Screening Checklists and Guidelines for the BNTF Programme (Guidance Manual), provides tools and templates to assist Consultants and IAs to screen, assess and manage environmental and climate risks, and to report on the environmental and social performance of sub-projects during implementation and operation. During the implementation of BNTF 10, the Environmental Screening Checklist and the Community Needs and Assets Assessment (CNAA) were revised to include guidance for climate risk screening. The updated screening tools which were applied to sub-projects under the Belize Social Investment Fund III (BSIF) will be included in the updated Guidance Manual for BNTF 11 and applied to BNTF sub-projects. The updated

⁹ The ESRP is currently being reviewed and updated

screening tools have significantly enhanced the BNTF portfolio. These tools provide essential guidance to IA staff and consultants throughout key phases of the BNTF project cycle, including screening, monitoring, supervision, and reporting.

4.12 During BNTF 10, all IA technical officers and senior management were trained in environmental and social risk management, and IAs were also supported in their efforts by ESD to develop institutional grievance redress mechanisms (GRMs). Training workshops were held with various IAs, in-country, to strengthen the quality of Environmental and Social Performance Reports (ESPR). These workshops have significantly improved the quality of reports submitted to CDB and improved the capacity of the IAs to monitor environmental, social and health and safety risks. Under BNTF 11, with support from ESD and SSD, efforts will continue to develop and enhance project GRMs; build IA's capacity to manage E&S matters, undertake climate risk screening; improve analysis of and reporting on environmental screening of sub-projects and improve E&S compliance and monitoring and reporting during implementation. PCs are required to submit two ESPRs to CDB. The first ESPR is due by October 31, 2027, or one year after Sector Portfolios are approved, and the second by October 31, 2028. Additionally, consultants will be trained to facilitate improved monitoring and reporting on the compliance of contractors during construction with the sub-project ESMPs. The revised Terms of Reference (TOR) for Consultants are attached at Appendix 4.4

4.13 Emphasis is being increasingly placed on programmes to strengthen actions for community CC adaptation and mitigation, and community DRM and preparedness. It is envisaged that for communities to take advantage of these opportunities, there will be a need for sensitisation sessions and skills training for which BNTF 11 could also provide some support.

SPECIFIC CONSIDERATIONS

Community Development Approach

4.14 Data-driven interventions will be formulated to identify the key gaps among beneficiary groups and community development professionals within national agencies to manage locally led development projects. With limitations identified, a Capacity Development Plan will be developed for each group/entity. This plan, crucial for enhancing key community development competency areas, will outline approaches to design and execute initiatives to reduce poverty and vulnerability. Community Engagement and Proposal Writing Online Courses will also support capacity-building, which will be available on CDB's learning platform.

4.15 The CDA is expected to generate several best practices emanating from the extensive interaction with local residents and the generation of new knowledge from this intuitive process. These community development innovations have the potential to significantly impact poverty reduction at the national, regional and international levels, adding to the overall discourse on community-driven development.

Livelihoods Enhancement

4.16 Improved livelihoods contribute to multiple SDGs: no poverty, zero hunger, gender equality, decent work, and reduced inequalities. Where necessary, capacity of community-based organisations and co-implementing agencies will be augmented to develop and execute requisite livelihoods interventions. The TORs for a Project preparation Specialist, Implementation Specialist and Business Development Specialist are at Appendix 4.5, Appendix 4.6 and Appendix 4.7. In small economies like the PCs, having viable livelihoods redound to the overall benefit of communities fostering community cohesion, reducing hardships and dislocation. A seminar on livelihoods enhancement in the Caribbean will be conducted as a foundational layer for work in this sub-sector as well as a livelihoods roadshow across BNTF PCs.

4.17 The Livelihoods Guidance note will be completed early in the new cycle and will help shape some of the working sessions and training in livelihood specific areas. Lastly, during this cycle, it will be important to ensure that CNAAs are aligned more closely with the requirements for Human Resource Development (HRD) and Livelihood Enhancement interventions including livelihoods assessments and broader stakeholder engagement. Targeting mechanisms will be sharpened to ensure that more young people, PWDs, indigenous and tribal people and women can benefit from interventions across the cycle and into subsequent cycles.

Youth-at-Risk

4.18 A full roll out of the BNTF youth empowerment framework will be orchestrated under the BNTF 11 Cycle by the end of year one of the cycle. This approach will include not just skills development but will also incorporate the type of support and facilitation that young vulnerable people require to have access to opportunities and to be able to grasp those opportunities. A bolstered focus on entrepreneurial and essential enterprise life skills, psychosocial support, and business development support will be integral in this process. Under BNTF 11, not only will PCs be encouraged to utilise a youth empowerment lens that leans heavily on the assets of young people but will also include vulnerable and youth-at risk focused sub-projects into their sector portfolios especially in the EHRD and Livelihoods sector. PCs will be encouraged to identify interventions that target youth-at-risk of becoming victims or perpetrators of crime, particularly young unemployed males. The TOR for a Psychosocial Support Consultant are at Appendix 4.8.

4.19 Agencies and community groups which service young people at the community level will be targeted for support through capacity strengthening actions by identifying and addressing challenges and opportunities which could be surmounted or capitalised. Moreover, there will also be emphasis on learning exchange opportunities between weaker groups and more successful groups as well either in country or in other PCs. Under the Youth Empowerment through Enterprise Pilot project, a Manual was developed for the application of mentorship programmes, which would be updated and shared across PCs. It is intended that a Regional BNTF Mentorship programme can be implemented under this Cycle covering emerging sectors for enterprise development or for general development of young people. This would include sectors such as fashion, music, animation and online opportunities along with opportunities in the green, blue and orange economies.

Gender Equality

4.20 Gender Inequality remains pervasive in the Caribbean. It takes the form of *inter alia* GBV, including violence against women and girls and male-on-male violence, economic disadvantage of women in terms of location in the economy and earnings and educational underperformance of males. The situation deteriorated further during the implementation of BNTF 10, due to the disproportionate impacts of COVID-19.

4.21 Given this background, BNTF 11 will further institutionalise the use of GAPs as commenced under BNTF 10 for the BNTF country programmes to deepen gender mainstreaming efforts in access to services, to livelihoods and trainings, decision-making, social norms change and GBV prevention and response. The GAPs shall systematise the gender gaps, activities to address those, timelines and responsibilities. In addition, a consultancy is underway to develop an online training in gender analysis and GBV prevention and response in community development projects, which will have as primary target groups CLOs of the BNTF IAs, National Gender Machineries and contractors. This is intended to bolster gender capacities in-country to enhance benefits, mitigate risks and sustain benefits. The BNTF 11 Programme is gender mainstreamed based on CDB's Gender Marker. Appendix 4.9 The Programme has the potential to contribute significantly to gender equality.

RESULTS MANAGEMENT AND RESULTS FRAMEWORKS

4.22 A clear set of measurable results will be identified for every sub-project. An M&E training consultancy was undertaken which has enhanced capacity among key stakeholders in the BNTF Programme in the appraisal, monitoring, evaluation, and reporting, on the areas identified as cross-cutting and the emerging themes within the sector portfolios. M&E requirements were built into the BNTF module of CDB's CRM Platform. The Reporting Schedule for the BNTF 11 Programme is in Appendix 4.10. The Draft Results Framework (RF) summarising BNTF 11 Programme design, and the associated performance indicators are in Table 4.1. The auxiliary list of project-level output indicators is listed in Appendix 4.11. These indicators are aligned with the Level 2 indicators in CDB's Corporate/SDF 11 (U) RF and modified with BNTF-specific indicators.

TABLE 4.1: DRAFT RESULTS FRAMEWORK

Project Impact				
To contribute to a reduction in the incidence of poverty in low-income vulnerable communities.				
Outcome	Indicator	Baseline	Target	Data Sources, Reporting Mechanisms and Report Frequency
Improved living conditions and quality of life of beneficiaries in selected poor and vulnerable communities in BNTF PCs.	Two years after completion of BNTF 11:			
	1. % satisfaction rating of the intervention by male/female beneficiaries (3 and above on a 4-point scale.	0	70	1. Beneficiary assessments. 2. Statistics from line ministries and executing agencies. 3. Ministry of Finance Estimates of Revenue and Expenditure. 4. Community-based maintenance plans. 5. MTE/impact assessment of BNTF 11
	2. Performance on standardised tests (by sex) in improved schools and training institutions (Percentage Points(pp)).	TBD	10	6. Household and Living Standards. 7. Measurement Surveys, as applicable. 8. Tracer studies and evaluation of beneficiaries of skills training and livelihood interventions.
	3. Attendance and/or enrolment. rates at improved schools and training entities (by sex) (pp).	TBD	10	
	4. Trained beneficiaries are gainfully employed (by age and sex). (%)	0	20	
	5. Households (by sex of head of households) in poor beneficiary communities with improved access to	0	60	

	potable water within 15 mins of walking. (%) 6. Reduction in travel time to essential services by beneficiaries (by age and sex). (%)	0	25	
<u>Assumptions for Achieving Outcome:</u> 1. Optimal participation by communities in and demonstrated ownership of project intervention 2. Wrap-around services are available to support training.				
Output	Indicator	Baseline	Target	Data Sources, Reporting Mechanisms and Report Frequency
Outputs:	By Project Year 4:			
1. Enhanced enabling environment for the delivery of education and training, water, sanitation, transportation and livelihoods services in poor communities.	1. Country Projects completed in compliance with programme standards (#) (See Appendix 4.10) – BNTF Outcome and Output Indicators).	0	10	1. IA Project Reports. 2. Supervision/Site inspection/monitoring visit reports. 3. Compliance Audits. 4. Beneficiary Surveys. 5. Sub-project Monitoring Reports 6. Sub-project Completion Reports 7. CPRs. 8. Consultants' Reports. 9. Environmental Performance Reports.
2. Improved human resource capability for management and key stakeholders. ¹⁰	2. Persons trained and certified (by age and sex). (#) 3. \$ from Eligible Partners. (#) 4. Interventions supporting capability enhancement for service delivery. (#)	0 0 0	TBD TBD TBD	10. Project statistics on sub-project interventions. 11. Training Statistics and Reports. 12. Pre-tracer and Tracer Studies. 13. Project Reconciliation Reports 14. KoboToolbox Reports 15. BNTF OP365 Reports
		0	TBD	

¹⁰ Target values for this output will be determined and specified during appraisal of sub-projects.

		5. Interventions supporting community-based management. (#)			
<u>Assumptions for achieving outputs:</u> <ol style="list-style-type: none"> 1. Qualified OE members, managers and other staff are available. 2. Similar competing interventions do not adversely impact implementation, especially during hazard events. 3. Required quality materials for construction activities are available in a timely manner. 4. In-country users update CDB's CRM platform to monitor and improve inefficiencies in a timely manner. 					
Project Inputs			FINANCING BY SOURCE (\$'000)		Data Sources, Reporting Mechanisms and Report Frequency
1. Country Projects:	CDB	Governments		Total	<ol style="list-style-type: none"> 1. Aide-Memoires. 2. Back-to-Office Reports. 3. CDB/line ministries/Gov't Reports. 4. CPR 5. Consultant Reports 6. IA Project/Audit Reports. 7. Grant Agreement 8. Programme/Project Reports 9. Independent Evaluations 10. Poverty Statistics
Sub-project Grants	31,760	1,664		33,424	
Project Management Support	2,235	6,138		8,373	
Institutional Development	304	-		304	
Project M&E	1,326	151		1,477	
Project Implementation Support	5,365	-		5,365	
Transfer Charges	9	-		9	
2. Regional Coordination	5,000	-		5,000	
Total Programme Costs	46,000	7,953		53,953	

GOVERNANCE AND INSTITUTIONAL ARRANGEMENTS

4.23 The Programme will support the achievement of good governance in criteria-based objective sub-project selection and implementation through participatory methods, accountability mechanisms, transparent procedures, and clearly defined responsibilities for Project management and operations.

4.24 As part of enhancements to BNTF programming, PCs, with the support of consultants, commenced the update of the CPF before the approval of the BNTF 11 Programme. This was a strategic activity executed to advance implementation in the new phase. PCs will prepare and adopt CPFs by August 31, 2025. The pre-approved TOR for the Update is provided in Appendix 4.12. The CPF is approved at the level of the Division Chief (DC), Social Sector Division (SSD).

4.25 CDB will manage the Programme activities and draw on additional resources and consultancy services as needed to integrate BNTF into the sector programming and operations of the Bank. The core BNTF team comprises the Portfolio Manager, three Engineers, a Social Analyst, a Gender and Development Specialist, a Community Development Specialist, an M&E Specialist, and a Portfolio Analyst. These resources will be supplemented, as required, with Officers from within and outside of SSD. In addition, the services of a Risk Advisor will also be necessary to support the management of compounded risk that most vulnerable groups are exposed to, as well as envisioned strategic, operational and developmental risks. TA projects will be implemented to (a) strengthen programme approaches, procurement and M&E; (b) develop tools and strategic interventions on poverty and cross-cutting issues; and (c) improve the use of Information and Communication Technologies to support networking, reporting and knowledge-sharing.

4.26 For BNTF 11, sub-projects will have the following upper limits. The President may delegate the approval authority for such sub-projects as outlined below. Partnerships with Eligible Partners may be allowed at all sub-project levels.

Small Sub-projects	For sub-projects the estimated cost of which does not exceed \$100,000: DC, SSD or above approves.
Medium Sub-projects	For sub-projects the estimated cost of which exceeds \$100,000 but does not exceed \$400,000: the Director, Projects Department (DPD) or above approves.
Large Sub-projects	For sub-projects the estimated cost of which exceeds \$400,000 but does not exceed \$900,000: the Vice-President (Operations) (VPO) or above approves.
Special Sub-projects	For sub-projects the estimated cost of which exceeds \$900,000 but does not exceed \$1.2 mn; the President approves.

4.27 All small, medium and large sub-projects approved at the above-referenced levels will be subsequently notified to the President

4.28 The approval of BNTF TA projects under BNTF 11 will be aligned with other levels of devolution for TA agreed by senior management, as follows:

Up to \$150,000	The DC, SSD or above approves.
\$150,000 but does not exceed \$300,000	The DPD or above approves.
\$300,000 but does not exceed \$550,000	The VPO or above approves.
\$550,000 but does not exceed \$749,000	The President approves.

4.29 All TAs approved by staff below the level of the President will subsequently be notified to the President.

Oversight Entity

4.30 OEs, with the composition and functions set out in Appendix 4.13, will be maintained by the governments of the PCs and will continue to have overall oversight accountability and responsibility for the coordination of the Country Projects in compliance with requirements, standards and covenants and administrative and technical aspects of Project performance as set out in the Grant Agreement between the Governments and CDB. It will be a condition precedent to first disbursement of each Grant that the OE has been assigned the oversight responsibilities set out in Appendix 4.13 for the PC's BNTF 11 Country Projects. It will be a condition of each Grant that the OE is maintained with the requisite composition and responsibilities for the duration of the project.

4.31 It will be a condition of each Grant that the membership, roles and operational rules of OEs be reviewed annually by the respective Governments and CDB, to improve the effectiveness of those bodies. The OE in each of the PCs has adopted the BNTF Operations Manual (OM) and any revisions must be subsequently agreed between the OE and CDB. Prior to disbursement in respect of any sub-project financed by any grant, CDB shall be satisfied that the sub-project has been prepared in conformity with the format set out in the OM and has been approved by OE.

Implementing Agency

4.32 The BNTF Country Projects will be implemented through the BNTF IAs. The BSIF, Grenada Rural Development Unit, the Jamaica Social Investment Fund (JSIF) and the Saint Lucia Social Development Fund are the agencies that implement BNTF in Belize, Grenada, Jamaica and Saint Lucia, respectively. The IAs in the other PCs are located in the Ministry of Finance/Department of Planning, Agriculture or Community Development. The IA will administer and coordinate all functions related to the BNTF 10 Country Project, including data gathering, M&E, procurement, performance reporting, quality control and management of monitoring and fiduciary systems. It will be a condition precedent to first disbursement of each grant that IA has been assigned implementation responsibility for the PC's BNTF 11 Country Projects. It will be a condition of each Grant that the IA is maintained with the requisite composition and responsibilities for the duration of the project.

4.33 The IA's core personnel will include a Project Manager (PM), CLO, Project Engineer (PE), M&E Officer, an Education Specialist, and Administrative/Accounting Officer (AO). The PE and M&E Officer may be engaged on a retainer or part-time basis. The Education Specialist may be engaged as needed. These posts are filled by the Governments of the PCs through recommendations which are endorsed by the Bank through provision of a "No Objection". The IA personnel are engaged on one to three-year contract and remunerated based on the agreed salary scales of respective PCs. Additional personnel may be recruited by the executing ministry/agency as needed. All IA personnel contracts are required to include performance evaluation criteria for systematic performance assessment by the ESPR. CDB will require increased frequency of reporting on Project performance to the OE Chairpersons to facilitate a fair process of evaluation. CDB will fully fund consultant PM posts in IAs where the PMs are solely dedicated to the BNTF Project. The IA may also engage technical consultants and other consultants using the Project Management Support component. Short-term/medium-term consultants, as needed, can be engaged by CDB on behalf of the IA where experts are not locally available. CDB will also collaborate closely with development partners operating in areas of mutual interest.

4.34 The TORs of the core personnel of the IA are presented at Appendix 4.14, Appendix 4.15, Appendix 4.16, Appendix 4.17 and Appendix 4.18. All PCs will be responsible for the engagement and

management of technical services consultants. The Programme Organisational Chart is presented in Appendix 4.19. As in the previous phase, it is proposed under BNTF 11 to accept BSIF and JSIF with their management and operational procedures and systems, which have been assessed by CDB to be acceptable.

Community Entities

4.35 There are several non-governmental organisations (NGOs), community-based organisations (CBOs) and teaching institutions that are positioned to represent community interests and participate in the BNTF Programme. An Organisational Needs Assessment determines the extent to which a CBO or NGO can implement a sub-project. The Programme will support institutional strengthening activities to improve communities' and stakeholders' participation in the Programme.

4.36 The role of the PMC is guided by a signed MOU or tripartite agreement among the sponsoring ministry, IA and the PMC. PMC's reporting responsibility is to the IA. Its role is to participate in the sub-project cycle, on the community's behalf, and to have a defined role in the sustainability of the intervention during operation. Resources under the Project Implementation Support component are provided for strengthening the monitoring function of the PMCs. Maintenance Committees shall be subcommittees of PMCs to promote the maintenance of facilities.

Regional Knowledge Management and Communication Strategy

4.37 The regional KMC and nine country strategies are focused on the underserved communication needs of varied BNTF stakeholders and options for addressing those needs. Under BNTF 11, the Strategies will be implemented via yearly budgeted KMC work plans. The country strategies and work plans will promote CDB's BNTF Programme and help to leverage private sector interests and investments. The strategies will work through social and traditional media, digital storytelling, videos, impact stories, etc., to increase the overall awareness of CDB's BNTF 11 at the community, national and regional levels. CDB's BNTF branding will be marketed in a more consistent manner following more clearly developed guidelines as articulated in the strategies. Information dissemination systems will also be strengthened including the building of partnerships with media houses at the national and regional levels. To oversee the successful implementation of these national strategies and plans, CDB will engage a KMC Consultant (KMCC) to work with the country teams to plan and coordinate KMC activities, and provide communications support as needed (see Appendix 4.20)

4.38 BNTF 11 will also continue to strengthen the capacity of the IA's through avenues such as Communities of Practice, knowledge exchanges and digital storytelling. The regional KMCC would work closely with CDB's Department of Communications and Corporate Affairs, to ensure full alignment with CDB's standards and guidelines (see Appendix 4.21).

Partnership Engagement Strategy

4.39 BNTF 11 will operationalise the BNTF Partnership Strategy, formalising its shift from ad hoc collaboration to structured, outcome-driven partnerships. These partnerships—particularly with private sector actors, donor agencies, NGOs, and regional technical bodies ("Eligible Partners")—will play a key role in resource mobilisation, project sustainability, and programme scalability.

4.40 The Strategy identifies three partnership categories, each requiring distinct competencies: (a) public-private partnerships necessitate corporate engagement and negotiation skills, (b) donor/development agency partnerships demand institutional alignment expertise, and (c) media partnerships require strategic communications capabilities. While IAs are strong in community engagement, analysis of Cycle 10 shows

they need further support to manage formal partnerships, particularly with the private sector. The Core Team also requires enhanced capacity to pursue regional partnerships and sustain external relations.

4.41 To address these gaps, BNTF 11 will deploy Partnership Development Specialists within IAs and contract a Strategic Engagement Consultant. These roles will support partnership building at both the national and regional levels through technical assistance, training, peer learning, and knowledge exchange. This integrated support structure is designed to embed partnership capabilities throughout the programme's operational framework and drive long-term strategy implementation. See Appendix 4.22 and Appendix 4.23.

IMPLEMENTATION

4.42 The BNTF 11 Programme shall be implemented over a period of 43 months, commencing June 9, 2025, and ending by December 31, 2028. The commitment of sub-project resources shall be concluded within the first two years of the Programme. The Programme Implementation Schedule is presented in Appendix 4.24.

4.43 During the preparation phase of the Country Project, PCs, with the support of consultants and CDB staff, will prepare sector portfolios of comprehensive, detailed outcome-focused sub-projects. Similarly, activities planned under the non-subproject components will be prepared along with the TOR for other consultants or facilitators as may be necessary. The sector portfolios of sub-projects and selection of non-sub-project activities will be submitted for the appraisal and approval of CDB. Teams of independent consultants will be engaged early, as needed, to assist IAs with the Country Project preparation and implementation to improve overall execution efficiency.

4.44 Knowledge transfer to IAs and a structured approach to working in a collaborative manner will be emphasised. CDB will promote continuous sharing of good practice, peer learning and mentoring.

PROCUREMENT

4.45 Procurement will be in accordance with the Procurement Policy for Projects financed by CDB (November 2019) and the Procurement Procedures for Projects financed by CDB (January 2021). All non-CDB financed procurement will utilise the PC's procurement rules. Each IA shall produce a procurement plan using the Procurement Plan Template provided in Appendix 4.25 as a guide and submit to CDB for approval. Once approved, Procurement Plans shall be published nationally and on CDB's website and be updated by IAs as necessary, with CDB's prior approval.

4.46 CDB will supplement its efforts to build capacity in procurement by providing continuous training in procurement (e.g., Incoterms 2020) especially for those countries that do not have a full-time Procurement Officer within IA. Further, the inclusion of the Project Implementation Support component under each Project provides budgetary allocation for the engagement of a Procurement Specialist (See TORs at Appendix 4.26 to support IAs on a short-term or part-time basis to provide procurement services. Where these services do not exist CDB may provide support through its Procurement Roster.

FINANCIAL MANAGEMENT

4.47 Each beneficiary will maintain a financial management system that ensures financial planning, programming, accounting, monitoring and reporting, internal auditing, external auditing, and internal controls arrangements acceptable to the Bank. Beneficiaries will be expected to manage the accounting for both CDB and the Government contribution.

Disbursement

4.48 The first disbursement of each Grant shall be made by September 30, 2025. Each Grant shall be fully disbursed by December 31, 2028, the TDD. Disbursements will be made in accordance with the 2019 Disbursement Guidelines for CDB-Financed Projects. CDB will not disburse more than 95% of the estimated cost of any small, medium or large sub-project and will not disburse more than 71.25% of the estimated cost of any special sub-project. The Terminal Commitment Date for sub-projects shall be December 31, 2026.

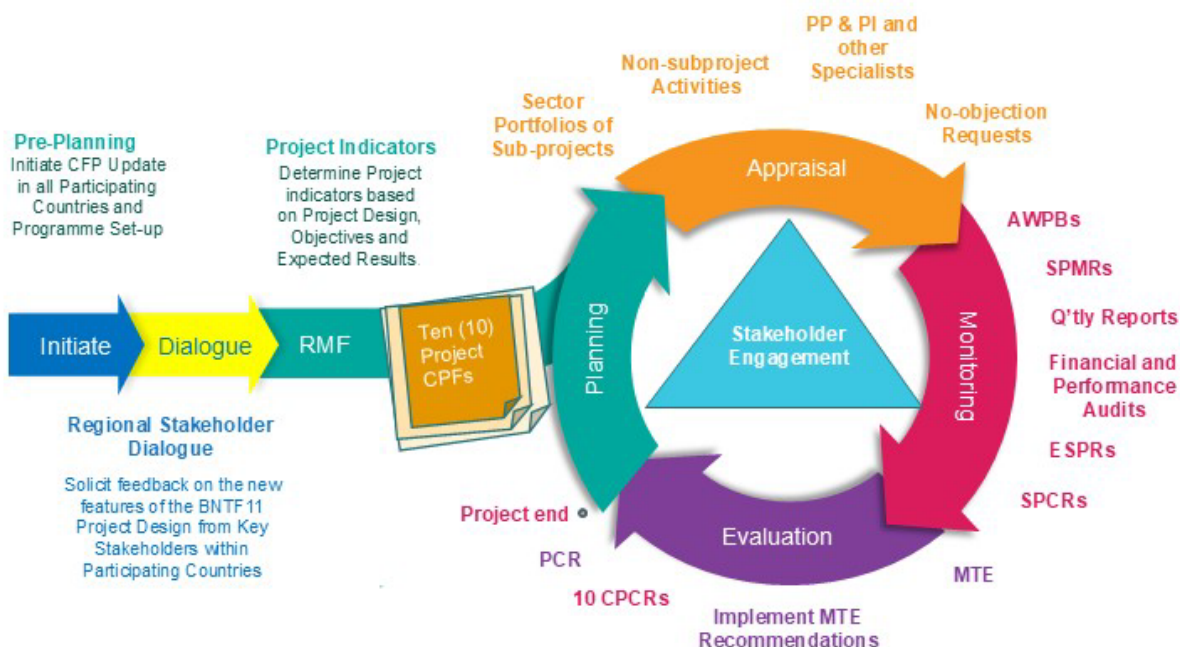
ARRANGEMENTS FOR M&E

4.49 Under BNTF 10, training and sensitisation was provided to the IAs in the use of the new BNTF module of CDB's CRM platform concurrently with the rollout of successive modules. The development of the Bank's CRM platform is aligned to Guiding Principle 1 outlined in CDB's Strategic Framework 2020-2024 Update: 'Pursuing value for money through additionality, impact and digital transformation'. This technology enhancements now fully support the management of the BNTF Programme, including the processes associated with appraisal, supervision and reporting across the project life cycle at the country level and at CDB.

4.50 As experienced in BNTF 10, CDB anticipates that new IA staff and OE members will have to be oriented as well as capacity-building of existing staff. CDB will therefore conduct workshops throughout the early implementation of BNTF 11 beginning the third quarter of 2025 targeting key stakeholders involved in the BNTF Programme to enhance their skills in project appraisal, monitoring, evaluation, procurement and reporting. The training will also highlight cross-cutting themes such as energy efficiency, gender and CC.

4.51 The BNTF 11 Programme will also retain the M&E requirements from BNTF 10. At the country level, the IAs will continue to be responsible for enhanced reporting of results. The use of Project and Portfolio progress reports especially for interventions in the HRD and no sub-sectors, the conduct of impact and beneficiary assessments, pre-tracer and tracer studies, case studies and other such reports will be systematised. PCs are required to submit the CPCR by December 1, 2028. At the Programme level, CDB will be responsible for the preparation of Programme level results reports, Annual reports, an MTE report, the PCR and other ad hoc management reports. The addition of an M&E Specialist at CDB with role and responsibilities as outlined in Appendix 4.27, will enhance this aspect of the Programme. The MTE for BNTF 11 will be conducted within two years of approval of the staff report by February 28, 2027, and the PCR will be completed three months after the TDD. The M&E process is outlined below.

BASIC NEEDS TRUST FUND ELEVENTH PROGRAMME MONITORING & EVALUATION PROCESS



EXPECTED PROGRAMME PERFORMANCE EVALUATION RATING

4.52 The expected composite score of the performance rating of the Programme is based on the current four standard criteria of CDB's Project Assessment System and is rated as 3.5. (Table 4.2 refers). This rating implies that there is a high probability that BNTF 11 will achieve its development objectives and that the Programme implementation performance will be of a high standard.

TABLE 4.2: EXPECTED PERFORMANCE ASSESSMENT SYSTEM RATING

Criteria	Expected Score	Brief Rationale for Performance Score
Relevance	4.0	The Programme is accorded very high priority by PCs and is consistent with CDB's priority of building economic and social resilience by building adaptive, coping and transformative capacities of individuals, communities and institutions to sustain well-being and improve quality of life. The Programme will enhance the capability of the most vulnerable in the ten PCs to pursue such development objectives. The Programme is aligned to PCs poverty reduction strategies and will contribute to the achievement of SDGs- particularly: (1) no poverty; (4) quality education; (6) clean water; (10) reduced inequalities; (11) sustainable communities; and (17) partnerships.

Effectiveness	3.5	The approaches utilised by BNTF have proven to be efficacious in reducing the incidence of poverty. The focus on public as well as private poverty interventions through a Gender Equality and Social Inclusion and youth development lens, will also improve programme effectiveness.
Efficiency	3.0	While no economic rate of return has been estimated, the engineering design process will ensure the least cost and most technically feasible options are selected for achieving sub-project objectives. Returns on investment in community infrastructure and human capital have been shown to outweigh costs.
Sustainability	3.5	Analysis has been undertaken, and responses have been developed to ensure that capacities (institutional, social, environmental, etc.) are present or enhanced to promote sustainability of actions. These include strengthening of IA and community capacities for engagement with stakeholders to ensure community buy-in and ownership of investments; maintenance capacity enhancements; bolstered partnerships and enhanced visibility that could also aid future additional resource mobilisation efforts.
Composite Score	3.5	Highly satisfactory

Maintenance

4.53 Insufficient funds for maintenance, the absence of maintenance policies, a poor maintenance culture characterised by deferred maintenance, and a lack of qualified facility managers in the public sector are significant challenges hindering effective maintenance of public infrastructure in the Region.

4.54 The BNTF 11 Programme will enhance its initiatives to actively engage communities in discussions about maintenance. This aims to promote greater local ownership and develop creative approaches to positively influence the maintenance culture. PCs will be encouraged to allocate a portion of their BNTF 11 grant funds specifically for a Maintenance Strategy and Plan related to selected areas or sub-projects submitted to CDB for its 'no-objection'. These strategies and plans will ensure stakeholders' inclusive and collaborative participation in all aspects of planning, budgeting, and executing facility maintenance. PCs recognise the vital role of preventive maintenance for community infrastructure, with some opting to hire consultants to conduct training in maintaining community assets and creating a Maintenance Manual that standardises best practices.

4.55 Efforts will focus on enhancing technical specifications to ensure the appropriate use of technology while considering both normal and micro-climatic conditions. This aims to minimise the risk of premature infrastructure deterioration. National public education and awareness campaigns regarding the significance of public infrastructure maintenance will be promoted across all levels with the involvement of key stakeholders. Under BNTF 11, PMCs will be essential in maintenance, extending their roles beyond the programme's execution phase. Additionally, to foster inclusive and collaborative maintenance efforts, school students can safely carry out simple building repairs on educational projects. This can be integrated into a new vocational training curriculum or included in the practical coursework in industrial arts, science, and/or home economics. Transferring knowledge to students' homes can nurture a culture of maintenance within the community and inspire future livelihood choices.

5. PROGRAMME FUNDING

5.01 The total BNTF 11 funding is estimated to be \$53.646 mn, comprising \$46 mn from SDF 11 (U) and \$7.646 mn from the 10 beneficiary governments. A summary of the Programme Budget is provided in Table 5.1.

TABLE 5.1: BNTF 11 PROGRAMME BUDGET
((\$'000))

	CDB	Governments	Total
1. Country Projects			
(a) Sub-projects	31,505	1,658	33,163
(b) Project Management Support	2,390	5,838	8,228
(c) Institutional Development	300	0	300
(d) Project M&E	1,359	150	1,509
(e) Project Implementation Support	5,436	0	5,436
(f) Transfer Charges ^{1/}	10	0	10
Sub-Total	41,000	7,646	48,646
2. Regional Coordination			
(a) Programme Management Support	2,000	0	2,000
(b) Programme Implementation Support	1,700	0	1,700
Programme M&E	1,300	0	1,300
Sub-Total	5,000	0	5,000
Grand Total	46,000	7,646	53,646
%	86	14	100

DISTRIBUTION RATIO TO PARTICIPATING COUNTRIES

5.02 CDB allocates the BNTF resources of the Special Development Fund (Unified) (SDF (U)) in two stages, first by having rules for country eligibility and second by allocating funds to PCs according to a Performance-Based Allocation System (PBAS) that takes country needs and performance into account. The objective of this approach is to strengthen development results by targeting needs, placing resources where they are likely to be effective, and giving PCs an incentive to perform well. The PBAS is based on a “composite score” methodology, that considers the Caribbean Multidimensional Vulnerability Index (CMVI) for each PC, along with its Gross Domestic Product per capita. The CMVI, which was developed by the Bank, determines an index for each PC based on its vulnerability and resilience across a range of critical dimensions relevant to the Caribbean region. The PBAS is a strong form of “policy dialogue” between the Bank and PCs. The BNTF Programme is funded by the SDF (U) and thus utilises the approved SDF (U) PBAS methodology.

5.03 Allocations to the PCs based on the composite score methodology are outlined in Table 5.2. below. The distribution of BNTF 11 funding allocations by country, project components and financing plan is at Appendix 5.1. PCs will provide local counterpart contributions in accordance with the amounts and timelines shown in Appendix 5.2. Where the sub-project consists only of CDB and local counterpart financing, the PCs shall contribute to each sub-project an amount that maintains the CDB to PC ratio of 95:5 of the estimated cost of the sub-project at the time of appraisal. Where the sub-project involves financing from an Eligible Partner, the PCs shall contribute to each sub-project an amount that maintains

the CDB to PC ratio of 95:5 of the portion of the estimated cost of the sub-project that is not being financed by the Eligible Partner.

TABLE 5.2: SDF 11 DISTRIBUTION PERCENTAGE FOR BNTF 11

Country	BDS	BZE	DOM	GRN	GUY	JAM	MON	STL	SUR	SVG
Distribution %	7.4	12.7	9.0	13.4	7.3	16.3	7.3	9.6	7.3	9.7

Partnerships

5.04 Going forward, efforts to leverage additional financial resources from the private sector and other donors will continue. It will be a condition precedent to disbursement of grants for each sub-project co-financed by an Eligible Partner that the IA has submitted to CDB, a copy of a fully executed agreement made between the IA and the Eligible Partner, in form and substance acceptable to CDB, setting out, among other things, the Eligible Partners' obligations with respect to the provision of financing for the sub-project and the details of such assistance. This approach aligns with BNTF's broader strategic framework, which calls for formalised, results-based partnerships grounded in clear governance and co-financing agreements. By embedding partnership agreements into the disbursement process, BNTF ensures alignment with its partnership strategy and strengthens accountability for partner contributions and impact.

6. PROGRAMME IMPACT

6.01 BNTF 11 will maintain its focus on delivering social and economic support aimed at assisting impoverished communities through a targeted and results-oriented strategy. The interventions are designed to enhance human resource potential, improve livelihoods and social conditions, and foster sustainable development of community assets.

6.02 Beneficiary communities will be equipped with coping skills and other strategies to mitigate their vulnerability and establish the foundation for comprehensive community-based development and poverty reduction, which aligns with the Bank's vision. BNTF 11 outputs will be progressively integrated into the SDF Level 2 Outputs of the SDF RF.

6.03 In addition, BNTF 11's initiatives will enhance the efficiency and effectiveness of public investments, foster synergies among ministries and development partners, strengthen the institutional capacity of PCs and communities, and promote a more integrated and focused approach to socio-economic development. During BNTF 11, the enhanced CDA approach, lessons learned, and best practices for social and community development will be documented as key knowledge products for enhancing citizen engagement in PCs. By tapping into additional resources through strategic partnerships with the private sector, the Programme's reach would be expanded, creating avenues for sustainability, and increase impact of interventions.

6.04 The poor and vulnerable face disproportionate exposure to risks and are more likely to experience adverse and severe responses to negative changes in their environment. Their capacity to withstand shocks and multiple stressors can be further compromised when they are positioned on the frontlines of crises, with very few options available to them to minimise both human distress and economic loss. Enhancing social, economic, and environmental resilience will be more firmly embedded in the BNTF 11 Programme through an emphasis on risk reduction and crisis management, which aim to address vulnerabilities to hazards and crises, uncover underlying causes of vulnerability, and promote equity.

6.05 Through gender mainstreaming, BNTF 11 will continue to (a) address gender inequality in its subsectors through equitable access to services; (b) empowering women to participate in project activities such as skills training, e.g. through adequate timing and location of trainings or the provision of child care; or in decision-making entities such as PMCs; (c) fostering norm change through gender-sensitisation and awareness raising and (d) risk prevention and response in terms of GBV. BNTF 11 will build on the immediately preceding BNTF Programmes.

7. RISKS ASSESSMENT AND MITIGATION

7.01 BNTF 11 will build on lessons learnt in previous Programmes and will strengthen its risk identification and risk management practices. Potential risks to the Programme are outlined as follows:

TABLE 7: SUMMARY OF RISK ASSESSMENT AND MITIGATION

Risk Category	Risk Type	Description of Risk	Mitigation Measures
Developmental	Institutional Capacity for Implementation and Sustainability – monitoring and evaluation arrangements	High staff turnover and limited operational and results delivery, monitoring and evaluation systems and capabilities could negatively affect project implementation.	<ul style="list-style-type: none"> • CDB will fund the PMs position, which is critical to ensuring stability of the IAs' project management arrangements. • Development of more comprehensive results and supervision, and M&E frameworks, such as operational reviews and compliance audits with clear roles and responsibilities for oversight. • The appointment of a dedicated M&E position at CDB will provide the strategic focus on monitoring and management for results.
	Institutional Capacity for Implementation and Sustainability – Implementation arrangements	Poor maintenance could reduce the design life of infrastructure sub-projects.	<ul style="list-style-type: none"> • Renewed efforts to ensure that OE members facilitate continuity of the beneficiaries' involvement with the subproject post-handover. • Stipulate that Maintenance Plans are funded.

Risk Category	Risk Type	Description of Risk	Mitigation Measures
Operational	Occupational safety & health	Impeded access to sub-project sites resulting from severe weather conditions during implementation might impact project execution causing disruption to project operators and other project stakeholders.	<ul style="list-style-type: none"> • Scheduling of construction activities during the dry season when sites are accessible. • Use by Contractors of appropriate contractual instruments (advance payments, guarantees, insurances), to stockpile materials in appropriate amounts to prevent materials shortages and delays. • Identification of alternative access to sites.
Strategic	Strategic Partner Relationship	Limited interest by potential partners due to lack of knowledge of CDB's strategic priorities and BNTF co-financing may reduce the potential for better outcomes.	<ul style="list-style-type: none"> • Partnership building and communications and visibility efforts will be scaled up in PCs to attract partners to invest in the BNTF Programme.
Developmental	Country Context - Political commitment	Political changes and influence on sub-project selection	<ul style="list-style-type: none"> • Promote IAs' use of the BNTF Prioritisation Tool, which provides an objective means of sub-project selection based on the analysis of weighted selection criteria.

8. **RECOMMENDATIONS**

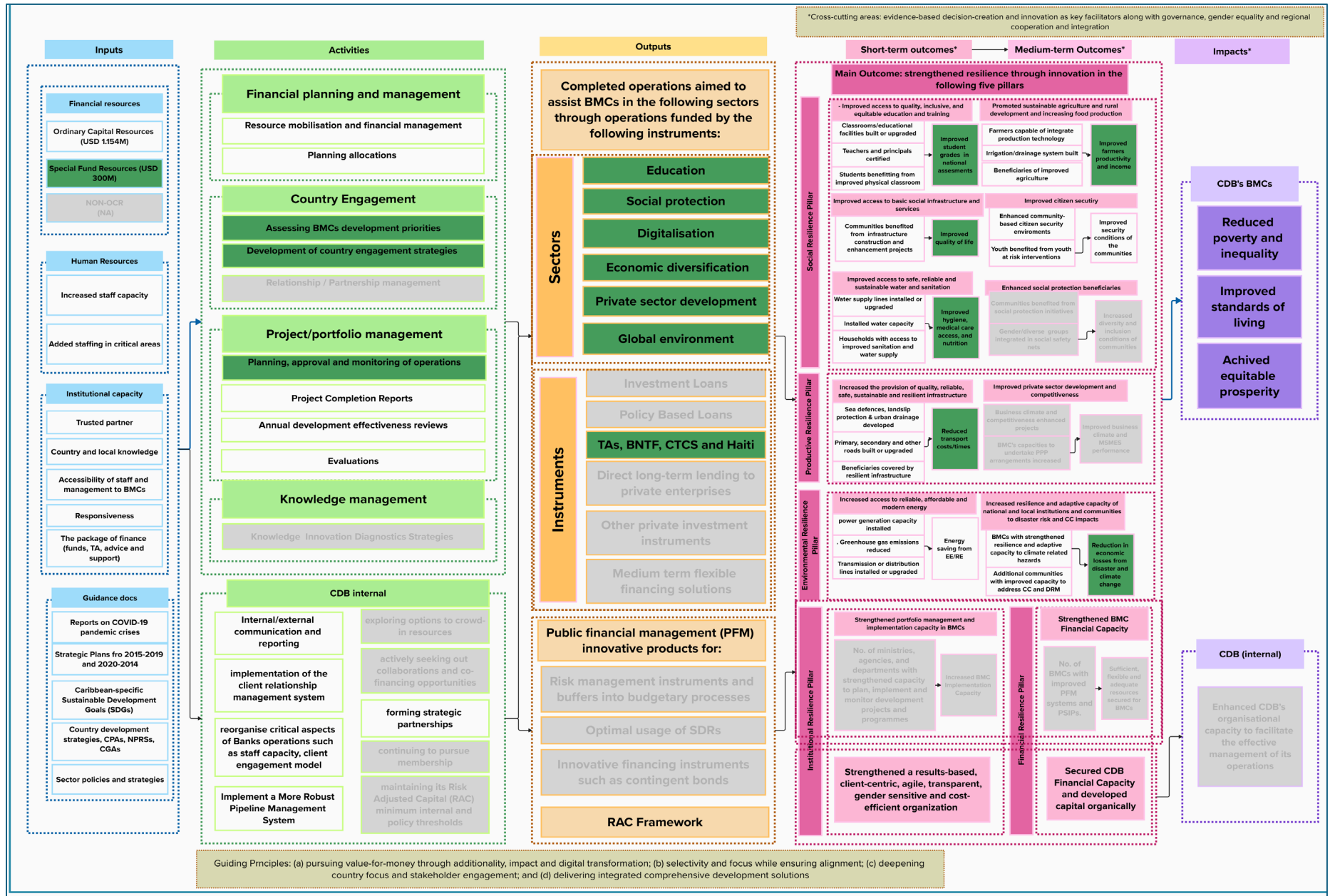
8.01 It is recommended that the Board of Directors (BOD) approve the BNTF 11 Programme as outlined in Chapters 4 and 5 of this Report.

8.02 It is further recommended that the BOD approve Grants to the Governments of the ten BMCs eligible to participate in BNTF 11, namely, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname (the Eligible Governments) in the amounts set out in Appendix 5.1 on CDB's standard terms and conditions and on the Terms and Conditions set out in Appendix 8.1.

8.03 It is further recommended that the BOD:

- (a) authorise the President, in the manner set out in paragraphs 4.26 and 4.28, to approve sub-projects and TA which are eligible for financing in accordance with BNTF 11 and, as appropriate, delegate such authority, as set out in paragraphs 4.26 and 4.28; and
- (b) approve the use of an amount not exceeding the equivalent of five million United States dollars (\$5,000,000) for regional coordination, including the engagement of independent consultants to perform the MTE and the preparation of the PCR; the CPF for a subsequent programme; pilot projects; and provision of other TA.

FIGURE 1: The position and role of the BNTF within the role of the Strategic Plan Updated



BNTF PROGRAMME¹

Cycle	Date of BOD's Approval	Participating Governments	No. of participating countries	Funding (\$mn)						No. of Sub-projects implemented	No. of Beneficiaries
				USAID	CIDA	CDB Grant	CDB Loan	Gov't	Total		
First Programme	Jun-79	Belize, Dominica, Grenada, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Antigua & Barbuda and Barbados	9	18.5		8	2		28.5	100	297,500
BNTF 2	Apr-84	Belize, Dominica, Grenada, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Antigua & Barbuda, Anguilla, British Virgin Islands and Turks & Caicos Islands	11		34.4	8.5			42.9	276	328,000
BNTF 3	May-92	Belize, Dominica, Grenada, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Turks & Caicos Islands and Guyana	9			15		6.3	21.3	175	520,624
BNTF 4	May-96	Belize, Dominica, Grenada, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Turks & Caicos Islands and Guyana	9			18		7.9	25.9	796	544,833
BNTF 5	Dec-01	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent &	10			32		15.2	47.2	961	1,074,346

¹ Status as of December 31, 2024

Cycle	Date of BOD's Approval	Participating Governments	No. of participating countries	Funding (\$mn)						No. of Sub-projects implemented	No. of Beneficiaries
				USAID	CIDA	CDB Grant	CDB Loan	Gov't	Total		
		the Grenadines, and Turks & Caicos Islands									
BNTF 6	Jul-08	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, and Turks & Caicos Islands	10			30.1		9.5	39.6	236	136,946
BNTF 7	Oct-12	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, and Turks & Caicos Islands	10			46		5.7	51.7	178	91,683
BNTF 8	Dec-14	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, and Turks & Caicos Islands,	10			11.9		0.5	12.4	56	27,931
BNTF 9	1-Mar-17	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Lucia, St. Vincent & the Grenadines, and Suriname	9			40.8		6.6	47.4	114	349,936
BNTF 10	Apr-21	Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Lucia, St. Vincent & the Grenadines, and Suriname	9			40		7.6	47.6	81	13,427

MACROECONOMIC CONTEXT**Recent Economic Performance**

1.01 Recent economic performance varied across BMCs, with each country navigating its own unique landscape of opportunities and challenges. Guyana's expanded oil production led to economic growth peaking at 63.3% in 2022 and reaching 43.5% in 2024. Meanwhile, real output levels in a few BMCs including Suriname are still below the amounts recorded in 2019. Also, several BMCs faced significant setbacks, with hurricane Beryl in July 2024 starkly exposing the region's acute vulnerability to natural hazards. Hurricane Beryl's impact in July 2024 had varying consequences including disruptions to agricultural production and fishing across countries, along with substantial infrastructural damage in Grenada and St. Vincent and the Grenadines, which was estimated at 16.5% and 22.0% of GDP, respectively.¹

1.02 Tourism remains a key economic driver in most BMCs, with over half returning to or exceeding pre-pandemic stayover arrivals in 2024. Construction is also significantly boosting economic activity, especially in service-exporting economies, where efforts are focused on upgrading and modernising infrastructure. Transportation infrastructure was a major focus in several countries such as Dominica and Grenada which advanced airport projects, and St. Vincent and the Grenadines, and Montserrat which pursued port development projects. Additionally, road and bridge rehabilitation, upgrades to educational facilities, hospital construction, and housing development initiatives continued across multiple BMCs. Investments in energy infrastructure gained momentum in 2024, highlighted by work on geothermal energy projects in countries such as Dominica and Grenada, underscoring the region's commitment to advancing the green energy transition and enhancing energy resilience. Concurrently, investments in water infrastructure in several BMCs bolstered efforts to improve utility services. Private sector investments further fuelled construction activity, particularly in the tourism industry, with the development of hotels and other commercial properties.

1.03 Inflation in the region eased in 2024 from its 2022 peak, mirroring global trends. As commodity prices on world markets fell, world inflation dropped to 5.7% in 2024 from 6.6% in 2023. This exerted downward pressure on inflation rates in BMCs, reducing the regional average to an estimated 4.3% in 2024 from 8.0% in 2023, although it remains higher than the pre-pandemic (2019) level of 2.6%. In 2024, Haiti had the highest regional rate of inflation at 26.9% while Suriname's inflation fell from a high of 59.1% in 2021 to 16.2% in 2024, aided by a stronger Surinamese dollar. Excluding Haiti and Suriname, the inflation rate for the region moderated to 2.2% in 2024. Regional food inflation was estimated at 5.7% in 2024, compared with 11.6% in 2023. Though easing, food inflation continued to be 2.8 percentage points above the pre-COVID (2019) average. Localised factors exerted upward pressure on food prices in some BMC economies. Weather events such as hurricane Beryl impacted agricultural and fish output leading to shortages and price hikes in both producing and importing countries. When excluding Haiti and Suriname, the rate of food inflation moderated to an estimated 3.6%, closely aligning with the global food inflation rate.

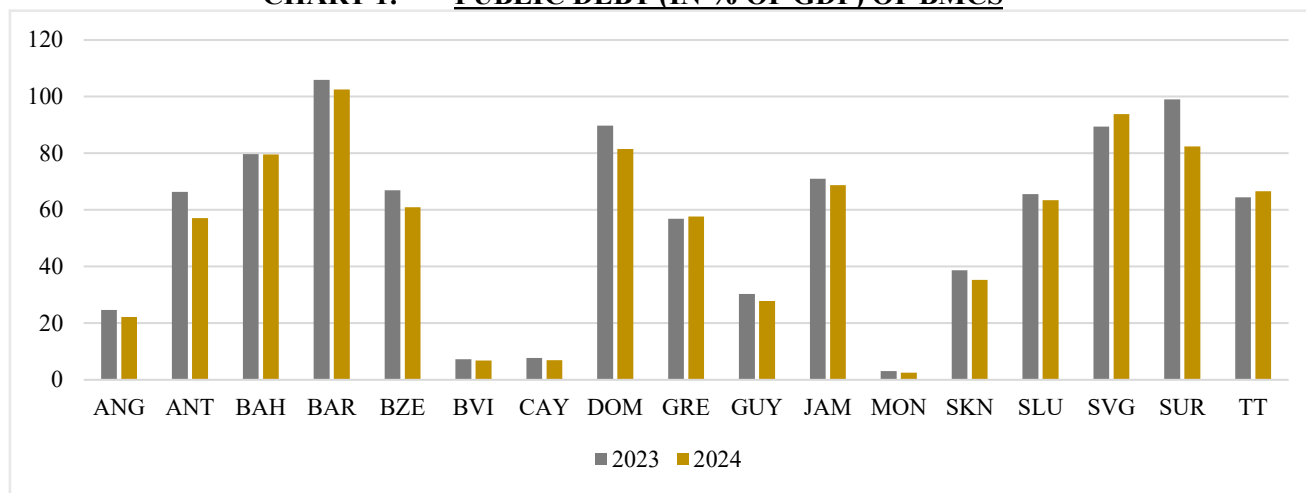
High Debt Levels Experiencing a Downward Trend

1.04 Most BMCs returned to a more sustainable debt path since the region's debt-to-GDP ratio peaked at 68.0% in 2020. The ratio fell to an estimated 52.0% in 2024, down from 57.6% in 2023. The contraction was driven by nominal GDP growth, as debt levels rose by approximately 3.3% compared to 2.0% in 2023. Improvements in debt-to-GDP profiles were supported by initiatives like Barbados' debt-for-climate swap

¹ Estimates obtained from the World Bank (WB) Global Rapid Post-Disaster Damage Estimation Reports, 2024. Estimate are expressed as a percentage of 2023 GDP.

and Jamaica's liability management efforts. However, post-hurricane reconstruction borrowings in St. Vincent and the Grenadines pushed its debt ratio to 93.8% in 2024 from 89.4% in 2023. Both St. Vincent and the Grenadines and Grenada, which faced severe shocks from hurricane Beryl, triggered climate debt clauses to ease financial pressure by reprofiling debt service payments and creating fiscal space for disaster recovery. With post-pandemic recovery and strengthened fiscal and debt positions, the sovereign credit ratings of five countries, including Barbados, Belize, Jamaica, and Suriname, were upgraded, boosting investor confidence. However, risks to debt sustainability remain in some BMCs, such as Saint Lucia, which faces significant rollover risk due to high short-term domestic debt. Moreover, public debt ratios in roughly half of all BMCs are above 60% of GDP (Chart 1).

CHART 1: PUBLIC DEBT (IN % OF GDP) OF BMCs

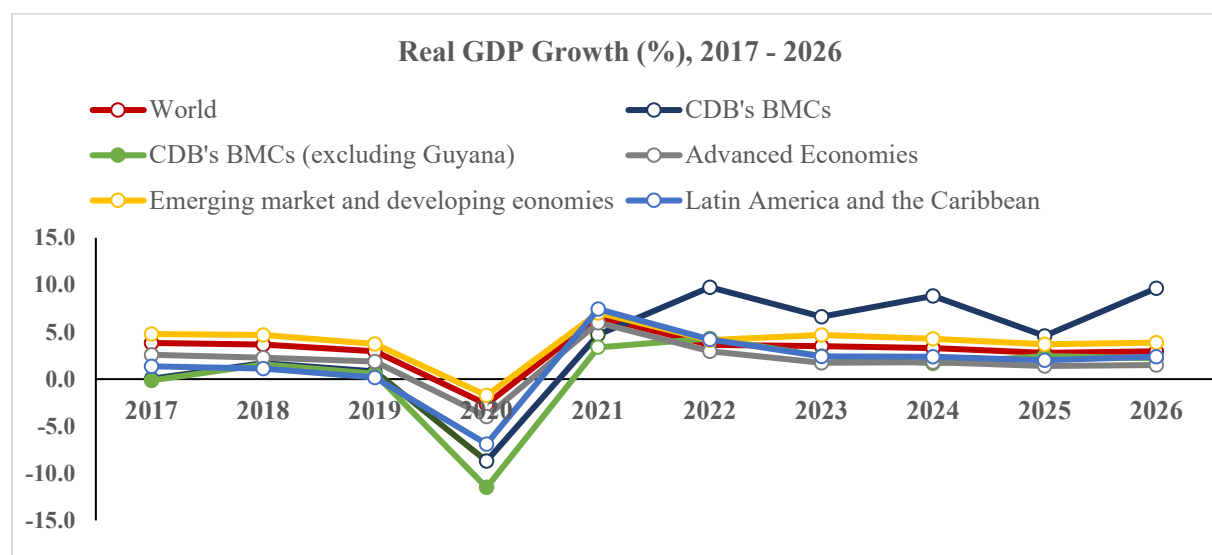


Sources: Central Banks, Ministries of Finance, IMF, CDB

Challenges and Prospects

1.05 Sustaining economic recovery is challenging for most BMCs due to the underwhelming global economy. Global growth was 3.3% in 2024, down from 3.5% in 2023, limiting economic expansions in most BMCs (Chart 2). A further slowdown in global growth to 2.8% is expected for 2025 amid intensifying trade tensions, with 3.0% projected for 2026. Global headline inflation is forecasted to reach 4.3% in 2025 and 3.6% in 2026, down from 5.7% in 2024.

CHART 2: GROWTH IN REAL GROSS DOMESTIC PRODUCT (GDP) IN SELECTED COUNTRY GROUPINGS



Sources: Central Banks, Ministries of Finance, IMF, CDB.

1.06 Regional economic growth is projected at 4.6% in 2025 and 9.7% in 2026, following an 8.8% expansion in 2024. Excluding Guyana, the region is set to expand by 2.5% in 2025 and 2.2% in 2026, with prospects varying across countries. Tourism and construction will drive growth, while improved fiscal and debt outcomes will support stability in the medium term. However, limited fiscal space and risks to sustainability remain challenges. Downside risks include escalated geopolitical tensions, prolonged slowdowns in major export markets, abrupt disruptions to global trade flows from US protectionist policies, and natural hazards. Accelerated economic transformation and human development initiatives, supported by grants like the BNTF, are crucial to avoid the pre-pandemic (2018-2019) regional growth average of 1.3%.

1. SECTOR CONTEXTS**Education and Human Resource Development and Livelihoods Enhancement****Education and Human Development Resource**

1.01 Education in the Caribbean has undergone a progressive journey, marked by significant achievements and ongoing challenges. Access to Early Childhood Development (ECD) services in pre-primary education for the three to five age cohort continues to improve with net enrolment above 60%, particularly in the Organisation of Eastern Caribbean States (OECS) member countries (with gender parity) and Jamaica¹. All Caribbean Community member states, except Haiti, have achieved universal access and gender parity in primary education. Additionally, many are nearing universal access to secondary education². There is a relatively high proportion of trained teachers in basic education, on average 75% across most countries, and drop-out rates remain generally low (less than 1%) up to the lower secondary education level. Vulnerable and at-risk students also have improved access to a suite of student support services such as transportation, uniform grants, school meals, textbooks and school counselling. There is an enhanced emphasis on the integration of Information and Communication Technologies (ICTs) for teaching and learning, catalysed by the urgent response for continuity in learning during COVID-19.

1.02 Ongoing challenges facing the sector include inequitable access to quality ECD services and tertiary education³ in the quality of infrastructure and teaching, and inefficiencies in resource use. While some countries have achieved near-universal access to ECD services for the three to five age cohort⁴, gross enrolment for the zero to two age cohort is as low as 20% in others and, net enrolment at the pre-primary level within the OECS member countries averages just over 66%. Across the Region, “inadequate student attainment in literacy and numeracy signals the continued struggle to achieve high-quality Basic Education and training.”⁵ Approximately 34% of students complete secondary education with five or more Caribbean Secondary Education Certificate passes including Mathematics and English⁶. This is coupled with a noticeable decline in male participation at the upper secondary and tertiary education levels.

1.03 Efforts to provide inclusive, high-quality learning experiences for PWDs, including students with special education needs, are constrained by inadequate physical infrastructure and sub-optimal mainstreaming of pedagogical strategies such as differentiated instruction and use of ICTs. The completion rate between the poorest 20% and the richest 20% in secondary education shows huge differences between 1% and 39% in Haiti and 19% and 74% in Belize and Guyana.⁷ In Suriname, there is a 22% gap in reading levels between the urban and interior regions as well as between different ethnicities, signalling the need for targeted interventions to equalise the quality of learning experiences for students regardless of socioeconomic status, geographic location or ethnicity. There is a need for increased access to Technical Vocational Education and Training (TVET) programmes, the provision of trained teachers and reducing the distance students travel to school, particularly in the remote interior.

1.04 There is a continuing mismatch between skills needed for a twenty-first century economy and society, including employability skills and critical thinking. Women face significant challenges in accessing work, higher incomes, leadership roles, decision-making positions, and participation in more productive and development-targeted economic sectors. Boys in the Caribbean face several educational

1 Including Grenada, Jamaica, St. Vincent and the Grenadines and Montserrat.

2 Haiti, Belize, Suriname and Jamaica are yet to achieve universal access to secondary education.

3 Source: OECS Education Strategy, 2012-2026, OECS Commission.

4 Including Jamaica and Grenada.

5 CARICOM Human Resource Development (HRD) Strategy 2030 Baseline Report (2020) 9 CARICOM HRD Strategy 2030 Baseline Report (2020).

6 CDB DER Report 2024

7 Global Education Monitoring Report 2020, Latin America and the Caribbean, Inclusion and Education: All means all. UNESCO

challenges. Higher dropout rates are a significant issue, with boys more likely to leave school early compared to girls⁸. Traditional teaching methods often fail to engage boys, leading to higher rates of disengagement and lower academic performance. Additionally, the lack of male role models in schools can affect boys' motivation and engagement. Social pressures to become breadwinners at a young age also contribute to boys' educational challenges⁹. These factors contribute to a significant gender gap in education, with fewer men enrolled at the tertiary level compared to women¹⁰. Gender stereotyping in subject selection persists, and high youth unemployment coexists with skills shortages in several key areas such as ICT, construction and related activities, healthcare, modern agricultural practices including agribusiness, and entrepreneurship.

1.05 The COVID-19 pandemic has underscored several important lessons for enhancing the resilience of education systems. Some of the important lessons learned include:

- (a) the need to invest in digital infrastructure and technology;
- (b) teacher training in digital tools and online pedagogy is crucial for effective remote education;
- (c) ensuring inclusive access to education through various media is vital;
- (d) addressing the mental health and well-being of the educational community is important;
- (e) engaging parents and communities supports home-based learning;
- (f) flexibility and adaptability in education systems are key to maintaining learning continuity during crises; and
- (g) the critical need for adequate handwashing facilities and inclusive Water, Sanitation and Hygiene (WASH) infrastructure in schools to prevent the spread of infectious diseases.

1.06 These lessons provide a roadmap for building more resilient education systems^{11,12,13}.

1.07 Across the PCs, efforts will be advanced to improve the quality of life through human capital development of key skills and youth and social development. Within the OECS member countries, universal ECD provision has emerged as the next policy goal associated with access and participation in education. These must be supported by improving teacher effectiveness, expanding access to pedagogical resources and mainstreaming inclusiveness, particularly special educational needs and gender-responsive programming. Teacher capacity must be enhanced to teach all students and address biases, such as 'looking down on low performing students' and at-risk behaviours such as 'bullying linked to gender identity/expression'¹¹. Digital transformation of the teaching/learning process has been identified by countries as a medium-term priority to build resilience in the education and training system and to make education opportunities more relevant and accessible for twenty-first century learners. Strengthening the leadership, management, and accountability systems in the Region remains a strategic focus in an effort to consolidate the gains achieved in the sector over the last 30 years.

8 Global Education Monitoring Report Team. (2021). Inclusion and education in the Caribbean: A fact-sheet based on findings from the 2020 Global Education Monitoring Report. UNESCO. Retrieved from UNESCO Digital Library.

9 Boys Need Targeted Mentorship, Inclusive Engagement, Skills Training to Help Close Gender Gap in Caribbean Education Say Experts | Caribbean Development Bank

10 World Bank. (2024, May 28). Tackling the reverse gender gap in the Caribbean. Retrieved from World Bank.

11 World Bank. (2024). Ensuring Learning Continuity During Crises: Applying Lessons from the COVID-19 Pandemic to Shape Resilience and Adaptability

12 UNICEF. (2021). Building resilient education systems beyond the COVID-19 Pandemic: Second set of considerations.

13 Global Partnership for Education. (2024). Adapt and learn: What have we learned from COVID-19 responses to make education more resilient to future crises?

Livelihoods

1.08 According to findings from the 2024 Caribbean Community and Common Market (CARICOM) Food Security and Livelihoods Survey, although outlooks have improved since 2020 when COVID 19 affected countries, livelihood disruptions continue to be a key feature affecting poor households across the region. Up to 44% of respondents confirmed disruptions to their livelihood strategies and 32% reported loss of employment, reduced income and revenue. This is conflated with reduced access to markets, increased cost of inputs, increased cost of living and more notable, food insecurity. Moreover, many young people although eager to work are unable to access decent livelihoods due to limited job availability, inadequate preparation for entrepreneurship, and a lack of access to finance and mentorship. The 2020 CDB Report about youth in the region noted that many youths struggle to transition into the workforce because of their soft skills, limited access to mentorship and a general lack of practical experience.

1.09 Human Resource Development efforts consider everyday situations and include not only technical and vocational instruction but also life skills, digital literacy, entrepreneurship, business development acumen and adaptability helping to equip individuals with the practical abilities they need to succeed in the real world. The United Nations Development Programme (UNDP) Caribbean Human Development Report (2016) also notes that a formal education does not always translate into employability, especially without competencies in communication, innovation, and resilience. Therefore, such methods must be holistic, hands-on, and responsive to market needs if it is to genuinely support sustainable livelihoods in the region. To improve livelihoods in the Caribbean, it is essential to adopt a broader, more integrated approach to skills development that aligns with real economic opportunities.

1.10 Bridging identified gaps requires investment in not just TVET programmes, but also community-based training, digital upskilling, and enterprise support systems. Consideration to combining skills training with work experience, industry partnerships and adequate support especially for vulnerable young people has been reinforced from the BNTF's operations over previous cycles as well as from observation of other programmes also operating in the space as a key area requiring increased emphasis. For a lasting impact, Caribbean governments, private sector actors, and development partners must work together to expand these approaches to livelihoods enhancement and ensure that the poor especially the youth and those in rural spaces or communities have access to resources, networks, and pathways that lead to sustainable and dignified livelihoods.

1.11 Improving livelihoods in the BNTF PCs requires a shift in perspective, ideally one that recognises that education alone is not enough to ensure access to opportunities and to surpass some disadvantages and structural inequities. HRD must be holistic, relevant, practical, and inclusive, helping people not just to find jobs, but to create meaningful, sustainable futures for themselves and their communities. Education systems must go hand in hand with labour market reforms that emphasise job creation, entrepreneurship, inclusive and equitable access to employment, worker protection, skills matching and reskilling. A renewed focus on youth unemployment and skills matching as well as enhanced labour market information and increased support for entrepreneurship and micro, small and medium enterprises are also essential. By investing in diverse forms of training, strengthening support systems, and aligning programmes with real economic opportunities, the BNTF PCs can help to unlock the full potential across their population. This is not only essential for reducing unemployment and poverty and bolstering incomes, but also for building more resilient, innovative, and inclusive Caribbean societies. A key aspect of this focus will be on zooming in on the livelihoods ladder and facilitating the movement of beneficiaries up that ladder. The expected outcome from a laser focus on livelihoods would be expanded options for income generation and earnings and overall improved quality of life for poor and vulnerable families living in disadvantaged communities.

1.12 Under BNTF 6 through BNTF 10, approximately \$73.4 mn was invested in 319 sub-projects to upgrade and construct basic school infrastructure, human resource development and livelihoods enhancement. See Table 1.

Water and Sanitation

1.13 Data on SDG 6 (clean water and sanitation), for 2022,¹⁴ for the Caribbean, indicate that for BMCs in general, and the ten beneficiary PCs in particular, the proportion of the population using an improved drinking water source is 99%. However, this figure is reduced to 94% when looking at the proportion of the population using safely managed drinking water services. There is a higher percentage coverage in urban areas when compared to rural areas. Although there is generally wide water supply coverage, the figures mask the challenges experienced by PCs with respect to matters such as regularity of service, non-revenue water, impact of CC, and the level of service, as such coverage does not necessarily equate to access. Those who do not have access to drinking water supply services adopt alternative solutions such as unsafe shallow hand-dug wells, illegal connections to the drinking water network, unsafe rainwater harvesting and, in many rural areas, obtaining unsafe water from surface sources such as springs and rivers.

1.14 The PCs also show very high coverage rates for sanitation with an average of 96% of the population using improved sanitation facilities, with most households using onsite sanitation systems, however, the proportion of the population using safely managed sanitation services is reduced to 71%. These average coverage levels mask significant differences between coverage of rural and urban areas within countries. In 2022, the proportion of the population using safely managed sanitation services in rural areas was 68% compared with 73% for urban communities in those countries. According to the data, pockets of communities within urban areas remain without sanitation services, most of which are informal settlements, which can be partly attributed to rural to urban migration. In many of these communities, residents discard waste directly into open lots and drainage systems. Waste dumping, inadequate treatment and poor maintenance of sewerage systems and inappropriate siting of sanitation systems, are acknowledged sources of increasing water pollution levels and pose health risks in both rural and urban environments.

1.15 While there is very limited data regarding hygiene, the available data shows that on average, within the region, the proportion of the population with basic facilities for handwashing with soap and water at home is 80%. There is therefore a need to scale up WASH interventions within the region if water and sanitation outcomes are to be achieved, especially following the challenges that have been experienced during the COVID pandemic. Furthermore, given the inextricable linkage between health and water and sanitation, health interventions that will bolster the effectiveness of the water supply and sanitation interventions must remain a key strategic priority for PCs.

1.16 Increasingly, fiscal constraints have had a negative impact on the allocation of resources by PCs for the expansion of service networks and routine maintenance of water and wastewater systems. This situation has been exacerbated by COVID-19, which not only increased financial constraints but also increased the demand for adequate water and sanitation services. Inadequate investments for maintaining and improving water and wastewater systems will continue to result in rapid deterioration of the infrastructure and allow for only limited expansion of networks. This has contributed to poor quality of service, low levels of efficiency, evidenced by high levels of non-revenue water (NRW); and, in some countries, highly intermittent service levels.

1.17 For many PCs, water quality, availability and supply systems are vulnerable to climate variability and change. The challenges caused by CC interrupt the continuous supply of water to households and heighten the awareness that having connections may not lead to/guarantee access to a reliable supply of water. Rural communities that are supplied from shallow wells and springs continue

to be at the highest risk with the poor, especially women and children, continuing to be the most affected. Therefore, there is a need to continue to strengthen resilience in these high-risk communities.

1.18 2.45 CC also threatens wastewater treatment structures. Sea level rise and flooding can damage wastewater infrastructure and can lead to overflowing of septic systems and pit latrines, exacerbating health risk of affected communities. It is therefore critical that the design and construction of water supply and wastewater systems be screened for CC risks.

1.19 Given the severe risks to health and livelihoods associated with lack of access to potable water supply and sanitation services, \$24.5 mn, representing 116 sub-projects, was invested under BNTF 6 thru BNTF 10 to enable the construction of water supply and sanitation facilities, and provide hygiene training, to improve community access to water and sanitation services. While there have been challenges implementing water supply interventions in far-flung communities due to the difficulty accessing those communities, water supply service providers have been very supportive in ensuring that these interventions have been successfully implemented. Additionally, they have been key partners in the WASH training for beneficiary communities, especially for the sustainability module of the training. Further details are provided in Table 1.

Basic Community Access and Drainage

1.20 The transport sector plays a critical key role in the economic and social development of the Caribbean Region (CR) and whilst progress has recently been made, the transport sector growth and lack of integration, connectivity and resilience to CC impacts can constrain wider economic growth. Many Caribbean countries' governments face common challenges in delivering the quality, climate resilient, efficient, inclusive and accessible transport infrastructure to support sustainable growth and development. Furthermore, the CR is characterised by tropical weather, flash floods and the annual threat of hurricanes that makes the region vulnerable to natural disasters and in turn adds to the cost of developing infrastructure as well as adding risk and disruption of key economic activities such as tourism and agriculture. One of the direct impacts CC had on the transportation sector is that BNTF 10 PCs transport infrastructure running along the coastline including eight airports. The Cheddi Jagan International Airport in Timehri, Guyana and Johan Adolf Pengal International Airport in Suriname located inland at 36 kilometres (km) and 48km respectively. The visible rising sea-levels increases the risk of overtopping during storm surges which causes flooding to roads especially in Guyana. These events negatively impact on the ability for BMCs to operate after events. BMCs public transport systems also play a crucial role in the movement of people for employment, education, health and tourism. ¹⁵

1.21 The poor condition of rural roads, in particular, presents mobility and accessibility challenges for users, (a) hindering children's travel to school, and access by the pregnant, the sick, the elderly and PWDs to basic services such as healthcare; and (b) limiting access for emergency vehicles and personnel. Unpaved roads also present health and safety risks, due to dust generation from wind and vehicular use, and the accumulation of water in potholes, which act as mosquito breeding sites. Farmers incur significant losses due to difficulty in accessing their farms and damage to harvested crops while transporting them over uneven access roads to the market. They also pay higher prices for the transportation of their produce due to the reluctance of transportation providers to traverse these roads.

1.22 Overall, issues facing the road infrastructure sector, especially feeder roads, are related to (a) inadequate funding and attention to preventative, routine and periodic maintenance; (b) lack of proper roadside drainage structures; (c) the higher unit construction cost compared to other types of infrastructure sub-projects; (d) deterioration due to the impact of overloaded of trucks and other vehicles; (e) national standards and planning capacity; and (f) the vulnerability of road networks and infrastructure to natural hazards and climate hazards in both mountainous and low-lying areas. Rural

roads located in mountainous areas are particularly vulnerable to landslides/slippages, while roads located in low-lying areas, especially in coastal zones, are vulnerable to flooding and storm surge, especially following extreme weather events. CC is expected to exacerbate these extreme events. Designs for roads and drainage structures therefore need to integrate considerations for enhancing resilience to natural hazards and CC to ensure longevity.

1.23 The public transportation sector has been constrained by, inter alia, limited policy development, planning, and institutional capacity as well as inconsistent use of planning tools. These have impacted the ability of line ministries to engage with communities on their ownership of basic infrastructure and their participation in maintenance activities. Although the primary responsibility for maintenance resides with line ministries, activities by community groups such as periodic cleaning of drains, debushing of road verges and the erection of physical barriers to restrict the use of community roads by heavy vehicles are often the only maintenance and protective measures carried out to sustain community access.

1.24 The vast majority of road traffic deaths, 92%, occur in upper-middle, lower-middle, and low-income countries combined. Thirteen percent (13) of road traffic deaths occur in lower income. (Global status report on road safety, 2023) Road accident death rates vary between just under 6 deaths per 100,000 population for Barbados to 24.6 deaths per 100,000 population for Guyana. (WHO Global Status Report on Road Accidents, 2018).

1.25 Under BNTF 6 thru 10 approximately \$23.3 mn was invested in the construction of 120 sub-projects in poor, vulnerable communities. Details of the investment are provided in Table 1. Nevertheless, despite significant investment programmes in BNTF PCs, not only from CDB but also from other bi-lateral agencies, the investment needs remain vast as the existing local and regional transport networks are inadequate to support the economic aspirations of the region. This infrastructure need is significantly increased as many of the BMCs are caught in an investment trap where they are not in a position to build sufficiently resilient infrastructure before being damaged by the next natural disaster.

TABLE 1
BNTF 6 TO BNTF 10: SUB-PROJECT COSTS BY SECTOR^{16 17}
(\$'000)

Country	Education and HRD		Water and Sanitation		Access and Drainage		Total	
	Amount	No. of SPs	Amount	No. of SPs	Amount	No. of SPs	Amount	No. of SPs
Belize	12,461	30	5,042	12	-	-	17,503	42
Dominica	3,701	23	5,512	12	1,708	10	10,921	45
Grenada	6,908	29	690	11	1,518	5	9,116	45
Guyana	14,904	77	5,966	49	4,739	39	25,609	165
Jamaica	16,374	53	1,854	8	5,742	14	23,970	75
Montserrat	1,397	13	932	5	1,349	6	3,678	24
St. Kitts-Nevis	1,643	22	145	2	644	8	2,432	32
St. Lucia	7,653	31	3,483	13	2,509	14	13,645	58
St. Vincent & the Grenadines	6,442	30	359	1	5,116	24	11,917	55
Turks & Caicos Islands	769	2	-	-	-	-	769	2
Suriname	1,108	9	482	3	-	-	1,590	12
TOTAL	73,360	319	24,465	116	23,325	120	121,150	555

Note: Any errors due to rounding

¹⁶ Data as at December 31, 2024

¹⁷ Focus on current sectors

BNTF 10 PROGRAMME: STATUS OF COUNTRY PROJECTS COMPONENT AS AT APRIL 30, 2025

ITEM	BZE	DOM	GRN	GUY	JAM	MON	STL	SVG	SUR	TOTAL	%
COUNTRY PROJECTS (\$'000)											
Sub-projects	4,318	2,439	2,325	6,777	7,081	461	2,986	2,825	1,184	30,397	70.0
Project Management Support	691	896	372	1,515	1,133	523	1,434	1,110	189	7,862	18.1
Institutional Development	43	24	23	68	71	5	30	30	12	305	0.7
Project M&E	130	73	70	203	212	14	90	80	36	907	2.1
Project Implementation Support	561	317	302	881	921	60	388	387	154	3,971	
Transfer Charges	1	1	1	1	1	1	1	1	1	5	0.0
TOTAL COUNTRY PROJECTS	5,743	3,750	3,093	9,445	9,418	1,063	4,928	4,432	1,575	43,448	91
Funding Sources											
Government (\$'000)	712	851	384	1,508	1,168	456	1,317	856	195	7,448	17.1
CDB	5,031	2,899	2,709	7,937	8,250	607	3,611	3,576	1,380	36,000	82.9
CDB as a % of Total Country Projects	87.6	77.3	87.6	84.0	87.6	57.1	73.3	80.7	87.6	82.9	
ANALYSIS OF CDB FUNDS											
Cumulative Commitments (\$'000)	4,843	2,131	2,218	7,340	6,422	487	2,713	3,515	996	30,664	
% Committed	96.3	73.5	81.9	92.5	77.8	80.2	75.1	98.3	72.2		85.2
Cumulative Disbursements	2,502	2,390	1,182	6,627	4,733	519	2,954	3,545	885	25,337	
% Disbursed	49.7	82.4	43.6	83.5	57.4	85.4	81.8	99.1	64.2		70.4
Sector Portfolios Approved											
CDB Grant (\$'000)	4,102	1,673	1,878	6,042	4,922	406	2,381	2,825	887	25,117	
Number sub-projects Approved	7	8	3	16	13	2	15	10	7	81	
Average Cost ¹ (\$'000)	665	141	665	380	491	203	103	173	88		

Note: Any errors due to rounding

¹ Median used

BNTF PERFORMANCE

BNTF 9

1.01 Independent consultants are currently undertaking the programme completion report (PCR) for the BNTF 9 Programme. The BNTF 9 Programme was approved on March 16, 2017, with a terminal disbursement date (TDD) of December 31, 2020. By April 2020, the programme was on track but suffered significant delays over the following 18 months due to the impact of the COVID-19 pandemic, which, for several months, brought implementation activities to a virtual standstill in all PCs. As such, the TDD for the ninth phase had to be extended by two years to December 31, 2022, to allow the nine PCs to complete sub-project implementation. The individual country project completion reports were also delayed, which deferred the completion of the BNTF 9 PCR.

1.02 The BNTF 9 mid-term Consultants found that BNTF remains a highly valued programme across all PCs for several key reasons:

- (a) **Responsiveness to Local Needs:** BNTF is seen as genuinely responsive to country—and community-identified needs rather than being driven by changing donor priorities, which has contributed to its continued relevance and effectiveness.
- (b) **Poverty Reduction Focus:** Poverty reduction remains a central priority in all PCs, which aligns well with the goal of BNTF.
- (c) **Programmatic Structure:** The Programme's structure allows for enhanced visibility and continuity, ensuring long-term impacts.
- (d) **Flexibility and Customisation:** BNTF's flexible approach allows it to be adapted to local contexts, making it more effective in addressing specific challenges faced by communities.
- (e) **Relevance of Basic Needs:** The concept of "basic needs" remains highly relevant, as many communities still lack essential services such as access roads, modern sanitation facilities, reliable water and sewage systems, and easy access to basic education facilities.
- (f) **Increased Focus on Livelihoods:** The increased emphasis on livelihoods has been widely welcomed, even in regions that did not initially take up this focus. It represents an expanded understanding of "basic needs" and is expected to deliver strong returns on investment in terms of poverty reduction.

1.03 The consultants also noted that beneficiaries and members of the Project Management Committees (PMCs) felt that they were appropriately consulted, and the Projects were seen to address genuine community needs. Early-stage projects were already delivering benefits to participants, indicating the Programme's positive impact.

1.04 Risks identified at appraisal were well managed throughout, however, the Programme was challenged operationally by the change in Implementing Agency (IA) and OE personnel in some PCs, resulting from changes in administration during the implementation of the phase. This required the orientation of new country staff and sometimes lengthy negotiations of previously approved project activities with the new administration.

1.05 Under the BNTF 9 Programme, CDB approved 35 sector portfolios: 27 sector portfolios of 109 sub-projects by April 2020 and 8 additional sector portfolios of 15 sub-projects related to the distribution of the performance-based incentive at mid-term by November 2019. All sub-projects were aligned with the poverty alleviation strategies included in the Country Policy Framework (CPF) reports prepared by respective PCs. A total of 116 sub-projects were completed, representing CDB grant financing of \$35.4 mn, which benefited approximately 349,936 persons in targeted communities. There were eight cancelled sub-projects. Utilisation of Grant resources averaged 97.3% and ranged from 90% for Suriname (the

newest BNTF PC), 94.3% for Belize and 99.3% to 100% for all other PCs. CDB disbursed 78.4% of the resources allocated for Regional Coordination. Overall, 95.3% of Grant resources under BNTF 9 were utilised.

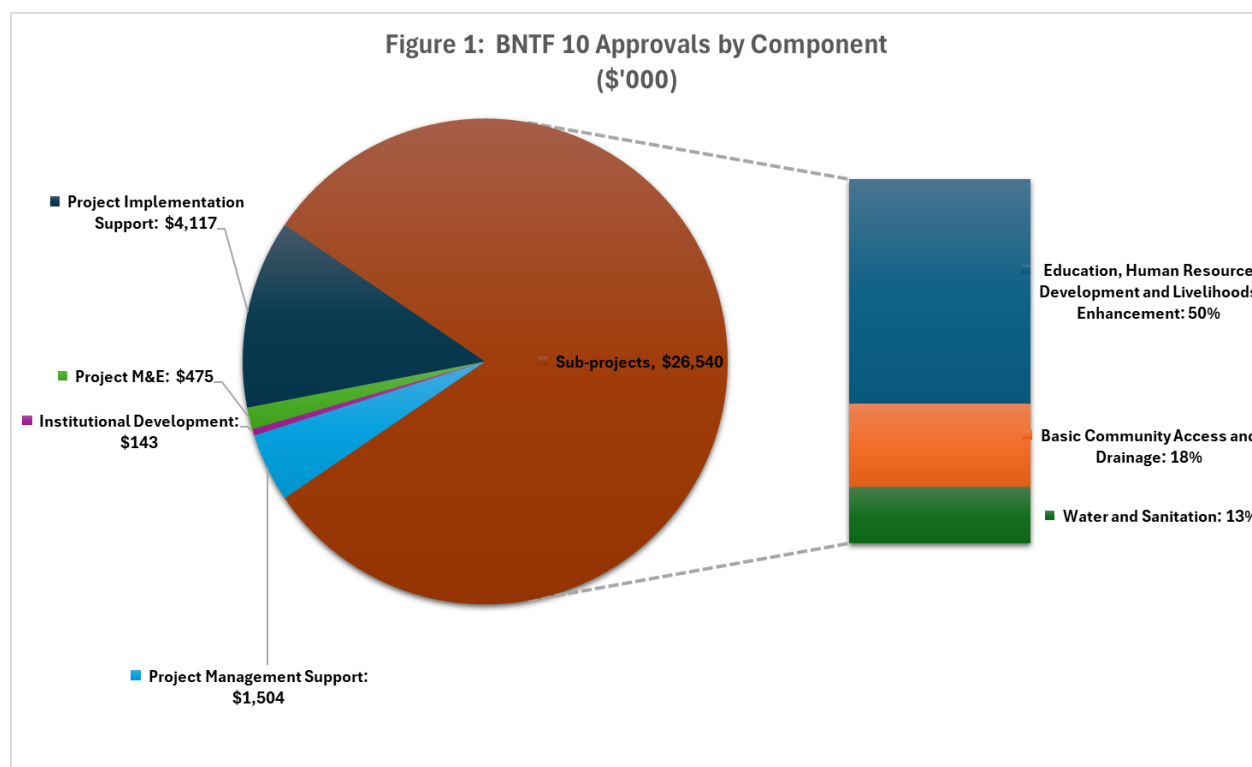
1.06 A review of the nine Country Project Completion Reports (CPCRs) and subsequent field observations indicate that the BNTF 9 Programme has achieved significant results despite the impact of the COVID-19 pandemic and other implementation challenges, which delayed completion by two years. The cumulative results can be listed as follows:

- (a) 232 classrooms in basic schools were built or upgraded, providing resilient infrastructure and modern facilities to 5,629 students. Satisfaction with the enhanced learning environment has resulted in improved attendance and student achievement. Concurrently, 606 teachers were trained in elements of basic education, which has improved their ability to deliver quality instruction.
- (b) 287,024 young persons were trained in various areas of capacity-building and livelihood enhancement, which has fostered the development of technical and entrepreneurial skills among targeted participants. Participants of livelihoods enhancement training gained the capacity to generate an income which has contributed to the reduction of poverty and the improvement of the local economy within their respective communities.
- (c) 5,547 households benefited from improved water supply and sanitation services integrated with water, sanitation and hygiene training. 53.8km of water pipeline was installed along with 1,382.9 m³ of water storage facilities, which have improved the resilience and reliability of a safe quality water supply to 33,349 residents, directly impacting the health and wellbeing of those who benefited.
- (d) 21.98km of community roads were upgraded, improving transportation, trade, and commerce primarily within rural, low-income communities, as well as the personal lives and commercial livelihoods of approximately 8,419 persons, including 4,650 women.

BNTF 10

- 1.07 The BNTF 10 Programme was approved by CDB's Board of Directors (BOD) on April 27, 2021. Reforms initiated under the BNTF 9 Programme to simplify and streamline its design and execution were further strengthened and institutionalised under BNTF 10. In addition, the programme introduced enhanced visibility measures, capacity-building initiatives for IA staff to engage with the private sector, and the implementation of an improved dedicated digital client relationship management system. The nine PCs prepared an evidence-based CPF to operationalise national objectives through a set of priority sub-projects. By April 22, 2022, all nine CPFs were approved by CDB, signalling the start of the sub-project implementation phase. All 23 sector portfolios of 92 sub-projects were approved by September 11, 2023, and four sub-projects as addendums to sector portfolios were approved by May 29, 2024.
- 1.08 Of the 96 sub-projects approved by CDB, 37 were completed by December 31, 2024, 15 were cancelled and the remaining 44 were at various stages of implementation. The majority of the 44 sub-projects under-implementation are expected to be completed by December 31, 2025, with the remaining few to be completed by June 30, 2026. The 15 sub-projects cancelled were mainly due to budgetary constraints, as actual costs outstripped the initial budgets, given increased labour and material costs.
- 1.09 Implementation delays were due to several challenges, including the disruptions caused by the COVID-19 pandemic, which significantly affected the BNTF 9 Programme and, in turn, delayed the start-up and overall implementation of BNTF 10. Additionally, natural hazards and extreme

weather events further impacted project timelines. Staffing and capacity constraints, driven by high staff turnover and recruitment challenges within IAs, hindered continuity and operational efficiency. Lengthy procurement processes and unsuccessful attempts to engage contractors and consultants also contributed to setbacks, while changes to the scope of sub-projects led to further delays. Efforts are being made to enhance processes and procedures to improve implementation performance. Some of these include revision of internal procedures, capacity building of consultants and contractors, and upskilling in continuous monitoring both at CDB and in PCs.



1.10 The Initial Disbursement performance improved significantly in BNTF 10 as compared to BNTF 9. Records show an increase from \$1.5mn or 4% of Grant financing in BNTF 9 to \$3.4 mn or 9% in BNTF 10 within the first two years of the Programmes. As of May 29, 2024, BNTF 10 resources to sub-projects had been fully committed. Figure 1 shows the distribution of resources with the approved allocation to Education and Human Resource Development (EHRD) being the largest - \$16.4 mn of the total of \$26.5 mn for sub-projects across all PCs. Some 14,005 persons have already benefitted under this phase. The Summary Report on the status of country components under BNTF 10, including some results to date, is shown at [Appendix 3.1](#).

1.11 According to the MTE of BNTF 10 conducted between June to September 2023 by an independent consultant, the BNTF Programme remains valued mainly because (a) its directly responsive to country/community-identified needs, especially in the post-pandemic era; (b) its programmatic nature provides the potential for enhanced visibility and continuity; (c) the Programme allows for and the customisation to local situations; and (d) its focus is firmly on poverty reduction, which remains a key priority in all PCs.

1.12 A Visibility Strategy was developed for BNTF 9 and implemented in tandem with BNTF 10. Each PC developed videos highlighting successful sub-projects implemented under BNTF 9. Eight videos were developed by the IA's and showcased at a fireside chat event held in Barbados. Other visibility products

include a supplement on BNTF 9 achievements to be published regionally, as well as a series of infographics and social media content. Based on the increased capacity of the countries to incorporate visibility into their work plans, more information on BNTF has been shared on IA's social media platforms.

Livelihoods

1.13 The framework for strengthening BNTF's approach to livelihoods continues to be built out to better respond to work in that sector. According to the BNTF 9 Consolidated CPCR (2025) targeted work in the livelihoods sector persist across several countries and there remains high interest across PCs to work in this sector recognising the impact on the most vulnerable. Dominica, Saint Lucia, Suriname, Jamaica and Guyana however were the countries that carried out interventions in that sector in the BNTF 10 programme. Under BNTF 10 approximately \$4.4 mn was approved across 14 projects in the livelihood sub-sector and expected to benefit 5,816 individuals including 2,480 adult females and 2,263 adult males and 548 youth females and 533 youth males. Many sub-projects under BNTF 10 are still ongoing so the full impact of same is not fully known

1.14 Supporting small-scale farmers, artisans, and service providers helps stabilise rural and peri-urban economies. Livelihood trends in the region reflect a deliberate move by vulnerable people across the region to diversify their livelihood strategies as more persons shift to having more than one pathway to income-generation. Moreover, CC, pandemics and economic downturns disproportionately affect the poor. As such, options must continue to be both strategic and resilient. Investments by PCs over the last two BNTF cycles have looked at sustainable livelihood practices in the agriculture spaces in Jamaica and Guyana and St. Vincent and the Grenadines as well as in the non-agricultural arena in activities such as music and fashion in Saint Lucia. Focus has also been on enabling PWDs and to augment their livelihoods as well as youth-at-risk to start enterprises for example in Suriname and Saint Lucia respectively.

1.15 The priorities under BNTF 9 and 10 were to ensure the smoothening of implementation past the challenges created by COVID-19 and the various hazards which impacted PCs. Cost of logistical changes to meet Covid 19 health and safety standards, the need for continued engagement due to quarantine requirements, costs and disruptions to participation through to completion all impacted results especially under BNTF 9 as well as the initial roll out of BNTF 10. In addition, the shifting of internal resources to respond to COVID-19 delayed follow through on the completion of work started on the guidance note and as such it would be crucial to have that work completed very early in the BNTF 11 cycle. This work would also extend to completing livelihood assessments as needed to correspond with proposed livelihoods interventions in the new BNTF cycle ensuring a more thorough appraisal process for these types of projects.

Youth Engagement and Empowerment

1.16 BNTF 10 utilised its Youth Empowerment Framework to inform the design and implementation of youth employment and empowerment initiatives. It was informed by lessons from the piloted Youth Employment and Empowerment through Enterprise initiative that was delivered in Saint Lucia and which targeted youth-at-risk between the ages of 18 and 24 years. A total of 49 young persons registered for the initiative and 32 participants completed the training in the areas of Contemporary Fashion Design and the Business of Music. 20 participants received cash grants of up to XCD10,000 each to either start or expand their businesses. This pilot represented a seminal collaborative partnership between the BNTF and the CIIF for the design and implementation of the initiative and opportunities to partner with CIIF in future endeavours will be sought.

1.17 A tracer study conducted about three months after the end of the Youth Employment and Empowerment Through Enterprise initiative noted that 90.5% of the participants interviewed who completed the training workshops had a very positive and empowering experience. This was because

participants felt they were provided with a course outline, sufficient material and supplies and support to complete tasks meaningfully. In addition, they were of the impression that their facilitators and business development consultants were competent individuals who exhibited good communication skills and a strong commitment to making the learning sessions informative, relevant, interactive and fun. Although they have not seen significant increases in their earnings, all participants were either employed or had started a business. The pilot reaffirmed that the youth empowerment model tested was well articulated and relevant. However, there was still the need to enhance implementation capacities, especially the capacities of some co-implementing agencies, to hone delivery strategies and project management skills overall, if the true benefits from the model are to be maximised. This is particularly critical when vulnerable young people are involved.

1.18 Related efforts to bolster youth organisations in PCs were grounded in an approach that focused on building the internal and external protective factors required to overcome adversity and build resilience. Under BNTF 11, the aim will be to continue strengthening BNTF's work with community organisations that address the particular needs of vulnerable groups, especially young persons. Areas of enhancement will include strengthening organisational capacity in governance, strategic planning, and technical/management capacity to implement HRD/livelihoods programmes as identified. This will lead to a smoother and well sequenced roll out of interventions more responsive to the needs of beneficiaries.

1.19 The YPOS, GEPOS as well as ETPS underpin CDB's approach to treating with this cohort of the population. Interventions in support of youth empowerment and engagement align with the YPOS objective which is "Enhanced youth empowerment in BMCs, and the related strategic pillars of action (a) enhancing young people's participation in, and contributions to sustainable economic growth; (b) harnessing and enabling the strengthening of youth social and intellectual capital via quality education; (c) contributing to the creation of healthy, safe, nurturing, and peaceful communities and spaces for young people; (d) supporting youth awareness, education and action on CC, disaster mitigation, environmental sustainability and food security; and (e) supporting active citizenship and youth participation in democratic and community life.

1.20 Critically, in keeping with YPOS commitments, CDB will ensure that, in projects where youth are identified as beneficiaries, employ a positive youth development approach and that the appraisal process includes analysis of and responses informed by the five factors that are key to understanding who is being left behind and why: (a) discrimination; (b) place of residence; (c) socio-economic status; (d) governance; and (e) vulnerability to shock.

Community Development Strategy

1.21 The BNTF 10 community development approach (CDA) was designed to empower communities and foster a closer relationship between the Bank and its clients. This approach was premised on the International Organisation Advancing the Practice of Public Participation (IAP2) spectrum of public participation, a model that promotes increased levels of shared decision authority. It emphasises the progression from merely informing citizens to fostering collaboration with communities and development partners, and ultimately, the state of empowerment, where communities are equipped to address further developmental challenges. This empowerment emphasis should instil stakeholder optimism about future development.

1.22 During implementation, the BNTF 10 CDA significantly emphasised data-driven decision-making. This approach was key in developing a comprehensive understanding of the capacity gaps within beneficiary groups and community-serving national agencies. A pilot capacity assessment of community beneficiary groups was conducted in Guyana, Jamaica, and Saint Lucia in 2023, targeting 22 community organisations, and a capacity development plan was subsequently developed. Data gathered throughout

this exercise were used to inform several interventions, responding to identified limitations. For instance, two regional proposal workshops were hosted in collaboration with the Caribbean Disaster Emergency Management Agency (CDEMA) to address the 94% of assessment respondents' lack of competency in writing award-winning grant proposals. Other interventions included several training sessions in effective community engagement and the use of online data collection platforms to secure greater community involvement, as well as the development of an online course in community engagement. This course will improve the skills of community development professionals to ensure local participation throughout the project lifecycle. It will be available for free on CDB's learning platform as of May 2025.

1.23 For BNTF 11, the CDA will be incorporated into the design stages of the programme, allowing for a comprehensive, community-driven approach that ensures the full engagement and participation of local communities in all elements, ranging from sub-project identification to implementation. This approach will utilise the KoboToolbox online data collection platform to assess the capacity of each beneficiary group, and the findings will inform actions geared at enhancing the skills and competencies of these organisations to sustain BNTF's investment as well as to execute additional programmes. Partnerships will also be established with the community development agency in each country and other key entities whose mandate involve providing support to community groups and civil society organisations. During the execution of this approach, lessons learned, and best practices for social and community development will be documented as key knowledge products for dissemination at regional and international conferences and other fora.

Partnerships

1.24 During Cycle 10, BNTF made significant progress in laying the groundwork for its formal Partnership Strategy, to be fully operationalised in Cycle 11. Recognising that sustainable poverty reduction in the Caribbean requires more than grant funding alone, BNTF assumed the role of convener, facilitator, and capacity-builder. The Programme adopted a systematic approach that included stakeholder mapping, capacity assessments, and strategic dialogue across PCs, transforming prior ad hoc collaborations into structured partnerships supported by engagement plans and measurable objectives. These efforts were informed by experiences from other community-driven initiatives, such as the Community Disaster Risk Reduction Fund.

1.25 BNTF's partnership work yielded tangible results in Cycle 10, with over US\$650,000 mobilised in co-financing and technical assistance through collaborations with local, regional, and international actors. A standout initiative was the regional Proposal Writing Workshop, which trained more than 300 community leaders. This capacity-building effort directly resulted in the submission of 11 proposals, of which six secured external funding totalling over US\$300,000. Beyond proposal development, this initiative addressed systemic capacity gaps, including financial literacy and legal compliance, and catalysed the development of an online course to extend access across the region. BNTF also invested in the digital transformation of programme delivery, hosting a US\$150,000 training workshop in Jamaica on KoboToolbox—a mobile data collection tool—attended by practitioners from 14 BMCs. Several participating agencies subsequently adopted digital monitoring systems.

1.26 BNTF also leveraged strategic partnerships to match technical and financial resources with critical local needs. This included securing direct support for vocational training programmes and school infrastructure projects. Of particular note was the Financial Literacy Training Programme co-developed with the Jamaica National Foundation and Canada's Local Engagement and Action Fund (LEAF), which targeted 200 civil society organisations in Jamaica. Informed by national statistics and BNTF's 2024 beneficiary assessments, the programme addressed longstanding weaknesses in financial compliance and grant-readiness among community organisations. The training series also serves as a model for structured, scalable interventions in Cycle 11. Additionally, BNTF boosted its regional profile through a media

partnership with the Caribbean Broadcasting Union, reaching a viewership of 4.8 million in 20 countries. The Programme's co-hosting of the 2024 Poverty Reduction Symposium with the African Development Bank and the World Bank—with delegates from over 27 countries—further cemented its role as a regional thought leader.

1.27 To prepare for Cycle 11, BNTF convened a Strategic Partnership Training session in November 2024 with IAs. The session was aimed at refining national-level strategies to drive stronger engagement and impact. Building on this momentum, BNTF 11 has set a clear objective to secure at least two high-impact regional partnerships. These collaborations will be critical to leveraging complementary expertise and resources to strengthen programme delivery, ensure sustainability, and scale results across BMCs.

Knowledge Management, Communications and Visibility

1.28 BNTF 10 saw a significant increase in visibility and communication around the programme's activities and projects. This was in part due to a more focused effort to highlight the work of BNTF as the relevant skills and capacity were embedded in BNTF. Since 2023, 16 press releases and 14 videos have been produced and disseminated. Eighteen participants across all IAs were also trained in basic video production using the editing software, CANVA. Since then, IAs have been producing videos on BNTF 9 sub-projects. Five CANVA videos have been created to date, and most PCs have been utilising the skills garnered to create videos for their social media pages, especially Facebook.

1.29 There has been an increase in digital media presence, including establishing websites (such as those for Saint Vincent and the Grenadines and Grenada) and a more consistent presence on social media by most of the IAs. Almost all IA's now have social media pages except Dominica. These pages provide platforms to document BNTF activities and history. There has been an increased observance of Global days, such as the International Day for the Eradication of Poverty, which was successfully piloted and executed in 2023 and 2024 by BNTF 10 staff in partnership with the WB, KoboToolbox, and ADB. The marketing of the programme has been boosted by its presence in spaces such as regional conferences and symposia – for example, the Planning Institute of Jamaica's Best Practice Symposium, held in October 2024, and Trinidad and Tobago's Disaster Symposium, held in June 2024.

1.30 With strengthened partnerships as well, BNTF played an integral part in KoboToolbox winning an international prize (KoboToolbox awarded the 2024 Pizzigati Prize for Software in the Public Interest).

1.31 As part of the ongoing effort to build the Knowledge Management and Communications (KMC) capacity of the IAs, a regional training workshop on Knowledge Management, Communications, and Strategic Partnerships was held in November 2024. In addition to building skills for the 22 participants in digital storytelling, maximising social media, and engaging with traditional media, the training focused on developing national KMC strategies, as well as consultations on a regional strategy. Discussions also centred around more effective Knowledge Management platforms. Since the workshop, nine draft Country KMC strategies have been developed and a regional KMC – all of which will be implemented under BNTF 11.

Building Social Capital

1.32 A greater emphasis was placed on building social capital under the BNTF 10 cycle through enhanced community engagement strategies aimed at fostering trust, collaboration, and capacity-building among beneficiary groups. This approach empowered local leaders and IAs to advocate for community needs and organise collective action beyond the programme cycle. Training initiatives, including the Regional Proposal Writing Workshop, enabled community leaders to secure \$186,000 to finance five projects in 2023 and 2024. Additionally, training in KoboToolbox improved project monitoring skills for

75 community leaders across 15 countries, with 18 government agencies and community groups adopting the platform for enhanced data collection and decision-making.

1.33 Networks were strengthened through partnerships with private and public sector entities, guiding beneficiary groups on formalising their operations as civil society organisations. These efforts empowered community groups to independently craft and implement programmes that improve the lives of vulnerable populations. With improved management and operations, community organisations are expected to enhance collaboration, build resilience to socio-economic and environmental shocks, and take more significant action toward sustainable development.

1.34 Looking ahead, BNTF 11 will focus on measuring social impact in targeted PCs and documenting stories of change to showcase the transformative outcomes achieved through the programme. Appendix 3.2

BNTF OP365

1.35 Currently, data on the Country Projects and Regional activities is stored by IA staff in our Customer Relationship Management (CRM) system (OP365 – BNTF module), which tracks the Programme's progress in PCs and at CDB from the planning phase through to completion. During OP365 development, many templates, including the CPF were upgraded and digitised. The Programme will continue its efforts to optimise business processes, streamline operations, enhance decision-making, uphold data integrity, and advance analytics and monitoring across OP365 and other digital platforms. Improvements will be implemented in the OP365 module to incorporate pilot projects centred on Artificial Intelligence, aimed at boosting operational efficiencies at CDB and within PCs. This will support the management of the BNTF Programme while improving planning, implementation, and M&E for both CDB and PCs.

Enhancing Gender Equality

1.36 Under BNTF10, an initiative has been started to create gender action plans (GAP) for BNTF country programmes. In a workshop held with 11 Community Liaison Officers of the BNTF IAS from May 30 to June 2, 2023, capacities were enhanced to design such plans and systematise the analysis of gender gaps and activities to address them. This initiative resulted in the design of gender-relevant interventions implemented under BNTF10, targeting in particular awareness-raising and social norms change, e.g. in the education sector and around gender-based violence.¹ Additionally, a TA was approved to engage a consultant to:

- (a) Develop a toolkit on gender analysis and gender planning in community development.
- (b) The development of three online training modules geared towards (a) gender analysis in community development projects, (b) GBV prevention and response in community development projects and (c) GBV prevention and response sensitisation for contractors.
- (c) The development of training activities with (NGMs) in Participating Countries.

¹ For example, in St. Vincent and the Grenadines and Grenada, gender-sensitisation trainings were implemented for 70 (10 male, 60 female) early childhood educators and primary school teachers raising awareness about the impact of the education system on gender norms and stereotyping at an early age. In Jamaica, an innovative community-based intervention to address awareness-raising, reporting, providing access to services and institutionalising a response mechanism to GBV and child sexual abuse has been implemented in a community where children are particularly at risk. This entailed, *inter alia*, the provision of a safe-place summer camp for 89 children (41 male, 48 female), counselling sessions, psychoeducational assessments, sensitisation sessions, workshops with parents and teacher training (to date 157 persons, 44 males, 113 females). In Guyana, in collaboration with the Ministry of Human Services & Social Security (MHSSS) capacity-building of 6 communities (Kurukubaru in Region # 8, Nappi & Surama in Region # 9, Warawatta in Region # 7, as well as Mashabo & Mainstay in Region # 2) was implemented that was geared to understanding, types, prevention and response to GBV in the form of behavioral response such empathy, conflict and anger management but also legal provisions in Guyana. To date 229 persons (65 males, 164 females) were trained.

DRAFT TERMS OF REFERENCE
STORIES OF CHANGE CONSULTANCY

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF), which was launched in 1979, is the main grant-funded programme of the Caribbean Development Bank (CDB) for pursuing poverty reduction in its participating borrowing member countries (PCs). The Programme targets the poor and vulnerable, through a community development modality that aims to improve the lives and livelihoods of beneficiaries in selected communities by improving basic economic and social infrastructure and services, and increasing opportunities for economic activity through skills training, capacity building and institutional development support. The programme is distinguished by its community-targeted, demand-led participatory approaches to the engagement of vulnerable segments of society for sustained people-focused development which reflects the strategic sector priorities as defined by the respective PCs.

1.02 This Consultancy will generate knowledge towards enhanced gender equality and social inclusion outcomes for beneficiaries among Programme stakeholders: donors, Implementing Agencies (IAs), partners and beneficiaries. It will make visible the benefits of the BNTF programme.

2. OBJECTIVES

2.01 The overall objective of the consultancy is to assess progress in terms of gender equality made through current and preceding cycles of the Programme. The consultancy will be instrumental to inform CDBs authorities in PCs, SDF Contributors, and other stakeholders on the progress towards meeting the Programme's cross-cutting objective of enhancing gender equality.

3. SCOPE OF SERVICES

3.01 The main purpose of this Consultancy is to measure through an independent consultancy the differential change BNTF has made on the lives of women and men in PCs (beginning at BNTF 9 to present).

3.02 Specifically, the assignment will focus on:

- (a) Ascertain from beneficiaries their perspectives on the performance of the BNTF with regards to gender equality and social inclusion throughout the project cycle, including project identification, planning, implementation and supervision.
- (b) Collect story-telling outputs on the differential impact that BNTF has had on the lives of women and men, boys and girls and other categories that are intersecting with gender such as indigenous people, persons with disabilities, age etc.
- (c) Produce communication outputs for CDB including videos, booklets, case studies, reports etc.
- (d) Determine lessons learned from the implementation of the Programme's activities and the outcomes achieved that will be useful to future Programming

4. **METHODOLOGY**

4.01 The Consultant(s) will gather data and perform analyses to attain the above objectives and with prior consultation with CDB, agree on the most appropriate methodology to fulfil the TOR. This will include:

- (a) Desk Review – Review of all relevant documentation, including documents produced by independent commentators outside of CDB, such as journals, newspaper articles, media reports and other written, audio or visual material.
- (b) Interviews/Surveys/Case Studies/Stories – Use of case studies is an appropriate evaluation tool in this context because it provides the opportunity to probe further the in-depth experiences of specific target beneficiaries or a subset of beneficiaries of BNTF Programming as a distinct part of the whole hence avoiding losses in the breath that comes from generalisation. More specifically, this will allow for greater latitude in seeking out and assessing the Programme impact through exposing a lot more about Programme processes and outcome and the ways they interact with each other.
- (c) Production of Communication Outputs – using the data produced from (a) and (b) above, produce visibility material outlining stories of change and impact. These outputs could include videos, photo-stories, booklets, best practices and reports etc.

5. **DELIVERABLES AND REPORTING REQUIREMENTS**

5.01 The schedule of the deliverables shall include the following:

- (a) **Work Plan** – for the implementation of the assignment shall, at minimum, include:
 - (i) Schedule of Activities
 - (ii) Sample population
 - (iii) Selection Methodology
 - (iv) Proposed communication outputs
 - (v) List of key personnel
- (b) **Survey instruments/Questionnaire and/or Techniques**
 - (i) Samples of Questionnaires
 - (ii) Details on the differentiated forum events
- (c) **Production of Communication Outputs for CDB**
- (d) **Reports**
 - (i) **Interim Report** – including the Work Plan, shall include the consultant's assessment of the assignment after initial discussion with CDB, rationale for the methodology to be followed, and milestones to be submitted within one week of the signing of the contract.

Draft Report – shall include the findings of the survey/assessment and analysis of the findings. The draft report must be modified to include all suggestions made for approval before it can be considered finalised. The report shall also include a report on the methodology employed in data collection.

- (ii) **Final Report** – the Consultant(s) will furnish a final report including supporting documents as cited in deliverables both as bound documents and in electronic format.

6. QUALIFICATIONS AND EXPERIENCE

6.01 The consultancy Firm should have:

- (a) A minimum of a Master's degree with elements of Social Research, Gender and Development, Statistics, Qualitative and Quantitative Data Analysis, Social Development, Monitoring and Evaluation and/or other relevant fields.
- (b) A minimum of a Master's degree in Communications or related relevant field.
- (c) (Seven (7) to ten (10) years' practical experience in ongoing M&E and Programme Assessment, project design and management, social development and analysis, knowledge of participatory approaches and methods, and the development of advanced quantitative and qualitative research methodologies for assessing programme results, outcomes and impact.
- (d) Five (5) years practical experience in story-telling and communicating developmental results.
- (e) Professional experience working on development programmes for community development and poverty reduction for International Organisations, Banks, and/or Trust Funds is highly desirable.
- (f) Preference will be given to those with experience in social or rural development/community-based development, and gender mainstreaming, particularly in the Caribbean region.

SELECTION CRITERIA FOR SUB-PROJECTS**INTRODUCTION**

1.01 The design of sub-projects will take a comprehensive approach emphasising sector and community linkages to support the achievement of sector results while integrating the cross-cutting areas of vulnerable youth, gender equality, environmental/natural disaster management, climate change resilience, renewable energy and energy efficiency, and maintenance. All sub-project requests, irrespective of origin, must have the sponsorship of the diverse members of the targeted poor communities or vulnerable groups and the relevant sector ministries and address sustainability issues of recurrent operating costs and maintenance. All infrastructure sub-projects must also be subject to environmental assessment and gender analysis.

1.02 Except as may be agreed by CDB, all physical assets financed by BNTF shall be publicly owned or constructed on land, which is publicly owned, or on a long-term lease agreement. Facilities or Services which are significantly supported by Government (e.g. faith-based run/owned schools) are eligible. Opportunities for the introduction of ICTs and green technologies at the sub-project level will be encouraged. Standards for construction activities would conform to national and industry norms.

1.03 Sub-projects will be selected in accordance with the criteria for the selection of sub-projects in each sector/sub-sector as set out below:

Sub-Project Type	Special Conditions and Notional Acceptance Criteria
BASIC COMMUNITY ACCESS AND DRAINAGE ENHANCEMENT	
<ul style="list-style-type: none"> Sub-projects that provide for the construction or rehabilitation of footpaths, rural roadways, small scale drainage systems, footbridges, light vehicle access bridges and small-scale boat landings to improve river transportation. Sub-projects that provide measures to facilitate continuous all-weather usage. Sub-projects that provide training to sub-project beneficiaries and PMCs in the maintenance of basic community access and drainage infrastructure. 	<p><u>Special Conditions:</u></p> <ul style="list-style-type: none"> Standards to conform to the norms and regulations of the relevant ministry/department. Support conditional on a guarantee of funds to meet recurrent costs, including maintenance. Strong linkage with beneficiary groups must be demonstrated. <p><u>Acceptance Criteria:</u></p> <ul style="list-style-type: none"> current traffic on the proposed road is at least 20- vehicle movements per day; the state of disrepair poses a health threat from rising dust, considerable slowing of traffic, or is dangerous and can cause accidents; access to homes with minimal infrastructure, is difficult or dangerous in inclement weather, given the nature of the terrain;

Sub-Project Type	Special Conditions and Notional Acceptance Criteria
	<ul style="list-style-type: none"> • access to farmlands and other areas of agricultural production is difficult, or to ease the movement of essential inputs to small-scale farms as well as produce to markets; • access to homes by emergency or service vehicles is difficult or impossible; and • the state of the road infrastructure limits access to social and other basic services and employment.
EDUCATION AND HUMAN RESOURCE DEVELOPMENT	
<ul style="list-style-type: none"> • Sub-projects that construct, rehabilitate, extend or substitute existing primary school and early childhood development buildings and facilities (excluding non-publicly owned schools) and the provision of furnishings and equipment. 	<p><u>Special Conditions:</u></p> <ul style="list-style-type: none"> • Standards to conform to Ministry of Education standards/norms. Support conditional on a guarantee of funds to meet recurrent costs, including maintenance.
<ul style="list-style-type: none"> • Sub-projects that provide funding for refurbishment or extension only of existing secondary schools including the provision of special learning spaces and school facilities. • Sub-projects that provide funding of school furniture, ICT technology, supplies and appropriate equipment for the delivery of the curriculum. 	<ul style="list-style-type: none"> • Standards for construction activities conform to national and industry norms. Spatial standards shall be guided by the requirements for ECD of the Ministry of Education and Regional Guidelines for Developing Policy, Regulation and Standards in ECD Services. Support conditional on a guarantee of funds to meet recurrent costs, including maintenance.
<ul style="list-style-type: none"> • Sub-projects that provide funding for facilities for expanded or enhanced student support services such as school feeding as needed for improved participation, retention and achievement. 	<ul style="list-style-type: none"> • Training programmes will remain on the schools'/ministry's curricula.
<ul style="list-style-type: none"> • Sub-projects that provide funding for facilities that cater to disadvantaged youth, community resource centres and sports facilities including the provision of equipment, musical instruments. • Sub-projects that provide funding for training of vulnerable persons, quality enhancement activities associated with local level training, career development, curricula implementation and teacher development related to sub-projects. 	<ul style="list-style-type: none"> • CARICOM and national ECD standards and training leading to NVQ/CVQ or other certification. • Where local resource persons, for example from the Ministry of Education or Labour, are unavailable, they may be identified through CDB's Caribbean Technological Consultancy Services Network, or other sources.
<ul style="list-style-type: none"> • Sub-projects that provide funding for market-driven skills training including ICTs, 	<ul style="list-style-type: none"> • Sub-project activity linked to specific sector infrastructure sub-project financed by BNTF to facilitate outcomes.

Sub-Project Type	Special Conditions and Notional Acceptance Criteria
<p>microenterprise skills development and ancillary training support geared towards enhanced incomes and entrepreneurship, in close partnership with certified training institutions and providers, NGOs, the private sector and employers; including support related to trainers, course materials, tools, stipends, internships, apprenticeships, and course evaluation tools.</p> <ul style="list-style-type: none"> • Sub-projects that provide funding for training of stakeholders related to facilities operation and management, use of conservation and green building practices, environmental/gender analyses, integration of disaster risk management practices and use of low- maintenance building materials including relevant certification procedures. • Sub-projects that provide funding for training for life enhancement skills and community capacity- building skills, including motivation and life- coping/empowerment capabilities for vulnerable groups, leadership and decision-making, organisational/institutional support, and promotion of pertinent project proposal planning, development, cost forecasting, performance monitoring, and maintenance planning related skills. • Capacity-building interventions for government institutions and non-government organisations in planning and monitoring. • Sub-projects that provide funding for other skills development and capacity enhancement areas that meet the criteria of relevance in terms of expanding social inclusion of vulnerable and marginalised minority groups. 	<ul style="list-style-type: none"> • National or sectoral policies, decreed by respective governments, that stipulate the criteria and specify the methods to be adopted for specific interventions, shall take precedence over those defined herein. <p><u>Acceptance Criteria:</u></p> <ul style="list-style-type: none"> • Overcrowding: The existing school is operating significantly over capacity, or where a shift system is in use, or additional students cannot be admitted due to lack of space. Space requirements per student should be guided by National standards set by the local Ministry of Education. • Distance: The distance to the school in travel time exceeds one hour. • Disrepair: The status of the physical condition of the buildings/facilities poses an environmental threat and is not conducive for learning/teaching.

LIVELIHOODS	
<ul style="list-style-type: none"> Asset distribution 	<ul style="list-style-type: none"> Sub-projects will provide productive assets to the excluded poor and vulnerable (who otherwise could not obtain these) to initiate a livelihood providing (and/or income-generating) activity.
<ul style="list-style-type: none"> Access to finance 	<ul style="list-style-type: none"> Sub-projects will facilitate access to small amounts of finance for the (unbanked) beneficiaries of BNTF livelihood programmes.
<ul style="list-style-type: none"> Building technical skills 	<ul style="list-style-type: none"> Sub-projects will equip groups of ‘the poor’ – possibly especially women, the young, maybe reformed offenders and other disadvantaged groups – with the technical skills that enable them to generate sustainable income and improve their life chances.
<ul style="list-style-type: none"> Building business skills 	<ul style="list-style-type: none"> Sub-projects will equip groups of ‘the poor’ – possibly especially women, the young, and other disadvantaged groups – with the business skills that enable them to generate sustainable income and improve their life chances.
<ul style="list-style-type: none"> Establishing a special regime for individual enterprise 	<ul style="list-style-type: none"> Sub-projects will present the disadvantaged and excluded with a special, efficient, and benign operating regime and business environment that facilitates their commercial initiatives.
WATER AND SANITATION SYSTEMS ENHANCEMENT	
<ul style="list-style-type: none"> Sub-projects that provide intake structures, water reservoirs and tanks, small water treatment facilities including training in the use and maintenance of the facilities provided, and also basic health and hygiene education. Sub-projects that provide supply and distribution lines to provide potable water to poor communities. Sub-projects that provide for the construction, upgrading and refurbishment of public baths/toilets/laundry facilities in remote or inner-city communities. 	<p><u>Special Conditions</u></p> <ul style="list-style-type: none"> Standards to conform to Sector Ministry for Water/Department responsible for Public Health, Tourism and the Environment. Support conditional on a guarantee of funds to meet recurrent costs, including maintenance. <p><u>Acceptance Criteria:</u></p> <ul style="list-style-type: none"> the existing source is untreated and unsafe for human consumption and poses a health threat through the spread of water-borne diseases.
<ul style="list-style-type: none"> Sub-projects that provide for the construction of minor wastewater disposal unit, solid waste management facilities. 	<ul style="list-style-type: none"> the proposed system will reduce access time to a safe water supply to the relevant population to less than 15 minutes walking distance.

<ul style="list-style-type: none">• Sub-projects that provide funding for training of vulnerable persons, including basic health and hygiene education.• Sub-projects that provide training to sub-project beneficiaries and PMCs in facilities management and maintenance, maintenance of infrastructure, water supply and sanitation systems operation and management, and conservation practices	<ul style="list-style-type: none">• the proposed structure will provide/contribute to improved wastewater or solid waste management system.
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BNTF 11 PROGRAMME COMPONENTS

1. The BNTF 11 Programme will comprise two components:

(a) Country Projects

- (i) Sub-project grants.
- (ii) Project Management Support.
- (iii) Institutional Development.
- (iv) Project Monitoring and Evaluation (M&E).
- (v) Project Implementation Support.

(b) Regional Coordination

- (i) Programme Management Support.
- (ii) Programme Implementation.
- (iii) Programme M&E.

COUNTRY PROJECTS

2. The Country Projects component of the Programme will include the following:

Grants for Eligible Sub-projects

2.01 The Country Project will comprise a portfolio of eligible interventions from the selected sector(s) and cross-cutting areas. There will be an appropriate balance between the allocation of resources for basic infrastructure and those for other developmental objectives, including community outreach and participation, enhanced service delivery and quality of outcomes, as well as the integration of cross-cutting themes and maintenance considerations to support the Programme. The design of sub-projects will take a more comprehensive approach through emphasising sector and community linkages to support the achievement of sector results. Sub-projects will be considered from the following sectors:

2.02

- (a) Education and Human Resource Development and Livelihoods Enhancement.
- (b) Water and Sanitation Systems Enhancement.
- (c) Basic Community Access and Drainage Improvement

2.03 The Selection Criteria for Sub-projects is presented in Appendix 4.1.

Project Management Support

2.04 This component comprises financing for project coordination including:

- (a) funding of selected Project Managers and other members/consultants of Project Implementing Units/Implementing Agencies, cost related to supervision and field visits and beneficiary consultations;
- (b) supporting fiduciary and risk management activities generated by audit reports;

- (c) enabling capabilities for IAs access to CDB's Client Relationship Management (CRM) portal for operations and maintenance, intranet, information-sharing and networking activities within and among communities to encourage community partnerships, networking, dissemination of lessons learnt, knowledge management and advertisements; and
- (d) social marketing to promote the visibility of the BNTF Project for greater engagement with communities, especially youth, as project partners and for increased commitment to the sustainability of Project interventions.

Institutional Development

2.05 This component will provide for short-term TA consultancies to support stakeholder and beneficiary engagement and enhance institutional and community processes for addressing cross-cutting issues and maintenance practices that are integral to the sustainability of Project outcomes. Technical support could be provided in areas such as:

2.06 Environmental sustainability:

- (a) development of policies and practices to promote community enterprises based on sustainable natural resource management;
- (b) refining and applying environmental monitoring indicators and reporting systems;
- (c) on-going skills development of implementing agencies and line ministries in environmental assessments and mainstreaming of environmental/DRM issues;
- (d) environmental/DRM training for small contractors and community-based water sector operators (in the case of Belize), and community committees and other entities involved in maintenance; and
- (e) building of awareness among stakeholders on green building standards, the use of energy-efficient and renewable energy, and water and natural resource conservation techniques in sub-project design.

2.07 Maintenance:

- (a) preparedness activities for the maintenance of infrastructure, including the participatory development of community-based and other maintenance plans;
- (b) formation and certification of trainer-of-trainers on maintenance;
- (c) development of overall strategic approaches to maintenance, including setting up incentive mechanisms and review of pertinent choices and specification of materials to minimise maintenance costs;
- (d) promotion of synergies within and among sector line ministries, among BNTF Programmes, mainstreamed CDB programmes in pertinent sectors and other assistance efforts to build economies of scale and address maintenance more comprehensively;

- (e) reviewing the applicability of innovative maintenance practices, such as community-based contracting, fund-raising, private sector sponsorship, outsourcing and user fees; and

2.08 Compilation of an inventory of the status of previous BNTF interventions in terms of maintenance requirements, including provisions needed for the establishment of a National Maintenance Fund or other financial mechanisms.

3. Gender Equality:

- (a) enhancing/improving equitable access to the allocation of resources and benefits within Programme activities;
- (b) operationalising and mainstreaming of gender analysis into stakeholder management, participatory community assessments, project appraisal and sub-project monitoring and results; and
- (c) enhancing the use of gender toolkits, targets, performance indicators towards results management.

Project M&E

4. Project M&E activities will facilitate the assessment of outcomes and the impact of the BNTF Programme at the country level. Various M&E tools such as Sub-Project Monitoring Reports (SPMRs) and beneficiary assessments will be used to track and assess implementation efficacy; use and maintenance of investments and the degree of stakeholder and community participation. Consultants will be engaged to conduct annual financial audits and biennial performance audits.

Project Implementation Support

5. Consultants will be engaged to provide services to support the implementation of the Programme including those associated with infrastructure works, capacity-building and skills development and other activities as may be determined.

The CDB has devolved increased responsibilities and accountabilities to PCs for project management and will continue to support areas identified for institutional development under the Regional Coordination component.

REGIONAL COORDINATION

14. The Regional component of the Programme will be coordinated by CDB through the following:

(a) Programme Management Support

- (i) provision of training in the use and operation of management information and results monitoring systems, the establishment of relevant data gathering methodologies for baseline development, data gathering for results monitoring, and associated skills development, preparatory work for surveys;

- (ii) establishment and operation of a database of best practices and lessons learned as well as pertinent e-learning and regional training activities building upon communities of practice to foster information sharing, networking and knowledge management; and
- (iii) conduct project launch workshops, meetings, project supervision, training, attachments and other consultancy support, as well as the support of communications facilities, travel and social marketing activities related to the Programme.

(b) Programme Implementation

- (i) finance independent performance audits, including financial audits, of IAs based on agreed performance benchmarks;
- (ii) include operational guidelines and eligibility and acceptability criteria in the OM;
- (iii) develop a comprehensive digital system to improve project and fiduciary management and reporting. Critical features of the new system will enable more efficient tracking of programme data; timely reporting; provide assessments of operational efficiency and improved risk management and foster information-sharing, networking and knowledge management;
- (iv) enhanced mainstreaming of BNTF in the wider operations of the Bank; and
- (v) support productive livelihoods development in collaboration with CTCS, which seeks to provide access to new technologies, business networks and enhanced marketing opportunities among micro-small- and medium-sized enterprises (MSMEs). Such support will augment training in technical and life skills or attachments as part of the education and HRD sector interventions.

(c) Programme M&E

- (i) Bi-annual assessments of the efficiency and effectiveness of the Programme, including client surveys and qualitative assessments. CDB will establish baseline data and targets for the Programme following the completion of Project baseline surveys;
- (ii) cumulative programme performance reports based on PCs' reports to monitor programme performance indicators, review disbursements as well as supervise sub-project and Programme implementation progress;
- (iii) an MTE will be completed by independent consultants contracted by CDB at midpoint and guided by selected performance criteria.
- (iv) a PCR to be completed by independent consultants contracted by CDB within three months of the TDD of BNTF 11; and
- (v) impact assessment: resources for financing independent consultancy services to evaluate BNTF 11 to determine its effects on the target beneficiaries relative to

primary welfare, infrastructure, social dynamics, governance, targeting and comparative effectiveness, and the sustainability of the programme results.

GUIDANCE FOR AN APPROACH TO ENHANCING CLIMATE RESILIENCE OF SUB-PROJECTS AND BENEFICIARY COMMUNITIES

1. BACKGROUND

1.01 The sectors in which BNTF invests, namely water and sanitation, health and education infrastructure, access and drainage, and livelihoods, are vulnerable to climate variability and change (CVC). BNTF currently screens its infrastructure sub-projects for natural hazard risks such as flooding and storm surge, among others. However, screening for climate change risks does not currently occur. While the Environmental Screening Checklist was updated to include climate change risk screening, and the Community Needs and Assets Assessment (CNAA) was also revised to assess climate change risks to communities, these updated screening tools are not currently applied. Moving forward, climate risk screening will be applied to BNTF 11 projects.

1.02 Integrating climate resilience considerations into BNTF operations is essential for the sustainability of benefits generated from the programme's interventions. To protect these investments from damage due to CVC, it will be necessary to ensure that appropriate adaptation measures are included in sub-project designs. Further, looking beyond avoided damages, BNTF investments can realize gains and maximize impact by helping to build the resilience of those affected to withstand the shocks and stresses caused by climate change, bearing in mind gender-differentiated roles and the potential for climate change to exacerbate inequalities between men and women and vulnerable persons. The integration of climate change into BNTF projects can not only include an assessment of the potential impacts of climate change on the project, but also the ability of the project to build beneficiaries' resilience to climate change.

1.03 Activities to support climate resilience may include:

- (a) on-going skills development of implementing agencies and line ministries in environmental assessments and mainstreaming of environmental/DRM to improve the quality of documented reporting on the environmental screening and monitoring of operations;
- (b) environmental/DRM/climate risk management training for small contractors and community-based water sector operators (in the case of Belize), and community committees and other entities involved in maintenance;
- (c) training for IAs and consultants to undertake climate risk screening and climate vulnerability and risk assessments commensurate with the nature of the sub-projects financed by BNTF 11;
- (d) building awareness among stakeholders on green building standards, the use of renewable energy technology, energy efficiency and energy conservation techniques in sub-project design;
- (e) promoting discrete community-based climate resilient and environmentally beneficial projects including livelihoods interventions. For these projects, consideration will need to be given to the additional time and technical resources often required for careful participatory design, preparation and implementation, which are critical for successful outcomes. These projects will also require closer collaboration with relevant public sector agencies;

- (f) Applying the updated CNAA to develop climate and disaster risks profiles of each targeted community and identifying potential adaptation options, including building community awareness; and
- (g) applying the revised Environmental Screening Checklist to screen for climate change risks.

1.04 These guidelines provide an approach to integrating climate risk concerns and resilience measures into the design of sub-projects prioritized for financing by BNTF and increasing resilience of beneficiary communities to climate and disaster risks. Section I outlines some recommended actions to integrate climate risks into sub-projects and protect assets and to invest in interventions that build communities' resilience to cope with climate shocks and stresses at different stages in the project cycle. Section II provides draft Terms of Reference for BNTF Sub-Projects requiring a climate vulnerability and risk assessment commensurate to the findings from the climate risk screening exercise. Finally, Table 1 indicates some potential impacts of climate change by each of BNTF's core sectors and suggestions of climate adaptation considerations that could be incorporated by sector.

2. RECOMMENDED ACTIONS TO INTEGRATE CLIMATE RISKS INTO SUBPROJECTS AND STRENGTHEN COMMUNITY RESILIENCE

- 2.01 Assess the potential climate impacts on the project. High risk of storms and flooding as well as drought can adversely impact BNTF investments and/or render them unusable. Sub-projects should be screened for climate risks, and any project being put forward for appraisal should be assessed for ways in which it can be adapted to be more climate resilient.
- 2.02 Identify sub-projects that help to improve beneficiaries' resilience to the impacts of climate change. Investments in social services, livelihoods, and other non-structural activities can build people's coping capacity and help to reduce the impact of climate events.
- 2.03 Climate risk can be integrated at three key points in the BNTF Project Cycle and can capitalise on the social focus and community driven process for identifying BNTF activities.

Project Identification

2.04 At the project identification stage, significantly more could be done to capitalise on BNTF's existing relationships with the communities generating sub-project ideas. Specifically, ongoing monitoring and evaluation, and the CNAA process, can be used to identify climate resilient sub-projects for consideration.

- (a) CNAA and other participatory processes should be used throughout the project cycle. Consultation with local stakeholders through this process should integrate a discussion on the key climate hazards that face the community, and priority measures that the community identifies that could help them to cope better with these shocks and stresses. This could be used to expand the list of activities considered for prioritisation and importantly could incorporate livelihoods activities.
- (b) CNAA and other participatory processes could be used to identify ways in which existing investments under BNTF can be enhanced to build climate resilience.

Project Screening

2.05 Projects in the BNTF pipeline should be screened for climate risk, using the available screening tools (environmental screening checklist and guidelines, and CNAA), and appropriate measures taken to address these risks in the project design. The screening should identify the risks that climate events pose to the project and the potential of the project to mitigate climate risk (either through providing protection/ structural measures or through building people's resilience).

Project Design

2.06 At the project design phase, a more detailed (qualitative) climate vulnerability and risk assessment CVRA will be required for those subprojects identified as having high levels of climate and disaster risks in the climate screening exercise. Guidelines for undertaking CVRA of BNTF sub-projects are detailed in Section II below. These could be drafted as TORs for the Design Consultants used by BNTF.

3. DRAFT TERMS OF REFERENCE FOR UNDERTAKING CLIMATE VULNERABILITY AND RISK ASSESSMENTS OF BNTF SUB-PROJECTS

Background [insert short para on the sub-project being considered]

Country Context [amend text below as required]

3.01 Current climate and future projections relevant for Country Z show: (a) an increase in mean annual temperatures; (b) overall decreases in rainfall; and (c) an increase in sea levels. Hurricanes and tropical storms are the principal hazards affecting Country Z, causing severe losses from wind damage and flooding due to storm surge and heavy rainfall. Country Z lies along the hurricane belt and, on average, is affected by a hurricane every three years.

3.02 Country Z has experienced tremendous damage from exposure to hurricanes in the agriculture and tourism sectors. The country's low-lying terrain in coastal areas enhances areas prone to flooding caused by hurricanes and storms. Country Z's major infrastructure such as public buildings, health, commercial and transportation facilities are located on or near the coast which makes them extremely susceptible to sea level rise. Some areas of Country Z experience drought conditions on a yearly basis. The projected increases in temperature make it highly likely that these areas will continue to experience drought conditions.

Objectives of the Climate Vulnerability and Risk Assessment

3.03 BNTF 11 intends to invest in a range of sub-projects covering education infrastructure, water and sanitation, human resources development facilities and opportunities for livelihoods. These infrastructures are very vulnerable to the impact of natural hazards. The objective of this assignment is to undertake a CRVA which would identify and evaluate the effects of potential climate change on the proposed sub-project and to identify resilience measures that could be included in the design and site plan. The key question the CVRA seeks to answer is: Is the investment and its site at risk due to current and changing climate conditions?

Scope of Work

3.04 The consultant should begin with a consultation with key community stakeholders who may be knowledgeable of existing vulnerabilities given the previous occurrence of extreme weather or climate related events, and undertake the following tasks:

- (a) Based on the CNAA and the information provided by the project proponent characterize the relevant infrastructure and surrounding area. This would include:
 - (i) description of the physical and environmental characteristics of the site and surrounding area; and
 - (ii) relevant features of the proposed infrastructure.
- (b) Hazard susceptibility of the area. Refer to the CNAA to obtain information on the susceptibility of the area, for example, to flooding (inland and coastal), hurricanes, landslides and/or earthquakes. Gather any additional information on historical events and impacts in the affected communities/sites.
- (c) Identify relevant climate variables and climate scenarios, based on best available secondary information ¹as locally specific as possible, for an appropriate time scale (2025 to 2050), and establish a baseline scenario of an appropriate historical period.
- (d) Identify the vulnerabilities of the proposed sub-project to the projected climate change, showing how climate risks could impair or enhance performance or sustainability. The key climate risks to be addressed should be identified based on the exposure (occurrence of the climate hazards) and the vulnerabilities of the components. This step would include learning from past weather and climate impacts.
- (e) The climate risk assessment in (c) would be used to identify resilience measures to address the impacts of the identified hazards such as expected wind gusts conditions for climate change scenarios that incorporate increase intensity of hurricanes (category 4 and 5 hurricanes), flooding conditions, erosion susceptibility, etc. Both structural measures, such as modification of design (e.g. enhancing roof designs to withstand higher wind gusts) and non-structural measures (e.g. emergency management procedures or training) should be included.
- (f) The additional costs, if any, of adaptation measures should be estimated and clearly explained. The costs and benefits of the adaptation measures should be included in the economic evaluation of the sub-project.
- (g) All data collected and created throughout the duration of the study, should be submitted in digital form (all shape files and corresponding metadata).

¹ Secondary sources of data include National Communications to the UNFCCC, Nationally Determined Contributions, the World Bank's Climate Change Knowledge Portal; CARIBSAVE Climate Risk Atlas; UNDP Country Climate Risk Profiles; Caribbean Community Climate Change Centre.; Climate Studies Group Mona, UWI.

DRAFT TERMS OF REFERENCE
CONSULTANCY SERVICES FOR THE DESIGN AND SUPERVISION OF SUB-PROJECTS

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF) Programme is a regional grant-funded initiative of the Caribbean Development Bank (CDB) which started over 45 years ago and is now in its tenth phase. BNTF is one of the CDB's key instruments for addressing poverty reduction by providing access to basic public services through the provision of social and economic infrastructure and the development of skills to enhance employability, community management and engagement. The eleventh phase of the BNTF Programme (BNTF 11) will continue to assist poor and vulnerable communities in nine BNTF Participating Countries (PCs), vis., Barbados, Belize, Dominica, Grenada, the Co-operative Republic of Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname. The BNTF Programme also includes a Regional Coordination component which is managed by CDB and supports programme implementation and management, and monitoring and evaluation.

1.02 Each PC has an established Implementing Agency (IA), which reports to an executing ministry, and is responsible for the administration of sub-projects in the respective country. BNTF 10 focuses on three key sectors/areas: Education and Human Resource Development (including citizen security, youth at risk, livelihoods and micro-enterprise development); Water and Sanitation and Basic Community Access and Drainage. The design of the sub-projects in these sectors/areas ensures gender inclusive participation by communities and transparency in community decision-making in the identification and priority setting process.

1.03 The Government of XXX (GOXX) has received financing from the CDB towards the cost of financing the BNTF 11 Project and intends to apply a portion of the proceeds of this financing to eligible payments under contracts for Consulting Services for the Design and Supervision of xxxxx Sub-Project.

2. OBJECTIVE

2.01 The objective of the consultancy is to provide technical support to the IA during the implementation of the BNTF 11 Country Project. Consulting firms will be required to review existing designs and estimates (where available); advise on scope and adequacy of sub-project proposals and provide revised preliminary designs and summary estimates, and detailed designs and Bills of Quantities. The work must consider thematic areas such as gender, climate change, renewable energy and environmental assessment and seek to integrate disaster mitigation measures into infrastructure subprojects. Firms will also be required to provide technical inspection of construction works.

2.02 The proposed intervention consists of:

[Insert sub-project components]

3. SCOPE OF SERVICES AND REPORTING REQUIREMENTS

Design Services

Preliminary Design Services:

3.01 The Consultant shall provide the architectural and engineering services necessary for the preparation of preliminary designs, plans and specifications for the Works and estimates of cost thereof in

sufficient detail to allow GOXX to consider and approve the suitability of such designs for the purposes for which the Works are intended, complying with the following requirements:

- (a) Review and collect relevant data in addition to conducting all necessary topographic and cadastral surveys by engaging the services of a licensed Land Surveyor, and geotechnical investigations to inform the designs.
- (b) The designs, plans and drawings shall conform to the standards published by [insert relevant Building Code], and to normally accepted design codes of practice.
- (c) Prepare a draft Environmental and Social Management Plan (ESMP) per sub-project.
- (d) Advise on the need for a more detailed climate vulnerability risk assessment following the initial climate risk screening.
- (e) In the absence of a grievance redress mechanism (GRM) at the BNTF IA level, the Consultant should prepare a project level GRM for public disclosure, to facilitate the receipt, acknowledgement and resolution of concerns and complaints related to the sub-projects.
- (f) Deliver one (1) hard copy and one (1) electronic copy of the Preliminary Design Report to the BNTF Implementing Agency (IA) and one (1) electronic copy to the CDB.
- (g) Conduct community consultations to obtain information on existing environmental issues, past hazard events and hazard vulnerability of the proposed sub-project site(s) and surrounding areas; and community disaster preparedness and response. The Consultant shall discuss considerations for improving resilience to climate change and natural hazard events.

Final Design Services

3.02 Following review of the preliminary designs, the BNTF IA and CDB shall provide feedback regarding the incorporation of resilience measures and ESMP requirements into the designs, and the BNTF IA shall instruct the Consultant whether to proceed to the Final Design Stage. Upon receipt of such instruction, the Consultant shall prepare:

- (a) Detailed designs with associated calculations. The Consultant shall furnish one (1) hard copy and one (1) electronic copy to the IA and one (1) electronic copy to the CDB.
- (b) The final designs and contract plans to a suitable scale with all dimensions clearly shown, and indicating details of construction for all structures or other Works to be built. The Consultant shall furnish one (1) hard copy and one (1) electronic copy of each final drawing to the IA and the Designated Representatives of the Beneficiary Community, and one (1) electronic copy to the CDB.

- (c) Specifications including a description of each item, materials to be used, properties of materials, methods of measurements, basis for payment, and all other technical requirements for the construction of the Works in accordance with the designs and plans. The Consultant shall furnish one (1) bound copy and one (1) electronic copy of such specifications to the IA and one (1) electronic copy to the CDB.
- (d) An estimate of the quantities of the various items of work required for the Works prepared in appropriate form, for use, where applicable, in a unit-price type of construction contract;
- (e) Estimates of the construction cost for the Works as confidential information for the IA and the CDB to serve as guidelines to the IA and the CDB in analysing proposals for the construction component of the Works.
- (f) A final ESMP per sub-project. Relevant components of the ESMP are to be integrated into the Tender Document.
- (g) Notices to Tenderers, proposal forms for construction contracts, performance bonds and such other documents required for the tendering of the Works where such works are to be constructed by contract.

Environmental Mitigation Measures

- 3.03 In keeping with the requirements of the approved ESMPs, the Consultant is required to:
- (a) Review the environmental mitigation measures specified in the Contract and ensure that the Contractor is aware of the said measures.
 - (b) Enforce compliance with environmental guidelines for quality control, environmental and social management, and health and safety, within the limits of the Contracts.
 - (c) Report on the positive and negative findings of the environmental and social management supervision activities and the performance of the Contractor in complying with the ESMP (including any non-compliances, need for corrective action, and emerging opportunities) via the monthly reports on environmental and social performance.
 - (d) Immediately inform the IA and CDB of any violation or accident that might merit the suspension of works until the corrective/mitigation actions have taken place.
 - (e) Assess any changes in the physical, environmental or other conditions that may have occurred since the time of the project preparation/design, advise on the effect of these on project costs and/or time, and put in place adequate measures to deal with these circumstances. If required, he/she shall propose revisions to the Construction Contract documents, which shall be sanctioned by the Client/Employer prior to revisions becoming effective. the Consultant shall take full responsibility for all the Construction Contract Documents.

3.04 In the event that the engineering estimates of the construction cost, inclusive of an allowance for minimum ten (10) percent contingency, Value Added Tax (VAT), price increases and ancillaries, where applicable, exceed the allocated end-of-construction costs, the Consultant shall, if requested by the BNTF IA, modify the Works in consultation with the IA and the CDB, so as to bring the estimated cost of the Works within, or as near as possible to, the allocated end-of-construction costs. Any such modification shall be included in the Final Design Services for the purpose of sub-paragraph 3.02 above.

3.05 If any additional sub-surface investigations or other field survey work of a substantial nature is required for design work, such services shall be for the account of the BNTF IA. Should additional sub-surface investigations be required, the extra engineering work for preparing specifications, supervising the drilling and making laboratory tests will be negotiated between the IA and the Consultant as additional services.

Pre-Construction Services

3.06 Where the Works are to be carried out by contract, the Consultant shall use CDB's invitation to bid form and BNTF Procurement Guidelines, advise the BNTF IA on the qualification of proposed tenderers, use BNTF's bid evaluation report format, assist in procuring tenders by the IA, review the tenders received, advise as to whether they appear to be correct and responsive to the tender documents, make recommendations for the award of the construction contract within one week of tender opening, and participate in pre-bid meeting with the IA.

4. TECHNICAL INSPECTION OF CONSTRUCTION SERVICES / SUPERVISION SERVICES

4.01 It is hereby accepted by the Consultant that the Supervision portion of this outlined Scope of Works is not automatic and is subject to a review of the Consultant's performance during the Design or Formulation phase. The Consultant shall provide the following professional services for the technical inspection of construction services for the Works reporting to both the BNTF IA and the CDB:

- (a) Provide the necessary Engineers, Inspectors and Surveyors per sub-project, with relevant qualification, to oversee the performance of the Works, and require that such performance be in accordance with the plans and specifications prepared by the Consultant. Such Engineers, Inspectors and Surveyors will have no obligation or authority to determine the manner in which the Contractor performs the construction work unless specifically provided for in the specifications. They will investigate, report and advise on unusual circumstances which may arise during construction.
- (b) Revise designs to suit unforeseen conditions which may arise during construction.
- (c) Undertake environmental monitoring during construction in keeping with 3.03, and the sub-project's ESMP; and apply the Consultant Environmental Checklist (included in the BNTF Guidance Manual) when site inspections are conducted.
- (d) Submit, monthly reports on environmental and social performance, which include an assessment of the Contractor's performance in complying with the ESMP, the effectiveness of mitigation measures, identification of opportunities for enhancing resilience, and any major environmental, health and safety issues that have occurred over the reporting period.
- (e) Consult with and advise the BNTF IA and GOXX during the construction period.

- (f) Conduct monthly progress meetings between the Consultant, Contractor and the BNTF IA, and prepare and issue minutes of said meetings.
- (g) Submit monthly reports on the progress of the Works including photographs in duplicate as required, progress charts/programmes and drawings to the IA and the CDB in a form acceptable to the CDB describing the construction work accomplished and maintaining appropriate construction records to be submitted to the IA and the CDB on completion of the Works. As a guide, the BNTF reporting format for project inspection by consultants should be used for reporting on the Works.
- (h) Check all shop and working drawings prepared by the Construction Contractor and suppliers to ensure full compliance of such drawings with the requirements of the Consultant's designs, plans and specifications.
- (i) Advise the IA on the suitability of sub-contractors.
- (j) Recommend and oversee tests to be performed on materials and equipment to be incorporated in the Works, such as testing of concrete cylinders, special soil tests and compaction tests.
- (k) Review and approve monthly estimates and invoices submitted by the Construction Contractor for payment of work completed and prepare payment certificates; and ensure that advanced payments to the Construction Contractor are utilised for the intended purpose.
- (l) Ensure that the Contractor has a site diary and that it is kept up to date and is accessible to all visitors.
- (m) Issue specific instructions to the Contractor and record these in the Site Record Book/Site Diary.
- (n) Verify the quantity and quality of materials being delivered to the site. This to be recorded.
- (o) Supply the Contractor with geometric surveys, schedules, specifications, bills of quantities and other Contract Documents to allow him/her to prepare a construction schedule and to review and/or revise such schedule upon receipt as well as periodically during the execution of the Works.
- (p) Ensure that benchmarks and other survey information are used to properly set out Works.
- (q) Prepare and supply to the Contractor variation orders with revisions to contract drawings, additional specifications or details that may be required for the proper execution of the Works, after having received approval from the Client/Employer for those variations. The Consultant must present to the Client/Employer any variations including estimate of cost identified within twenty-four (24) hours of identification. The details of the variation must then be provided to the Client/Employer within two (2) weeks of identifying the need for a variation(s) on site.

- (r) Where the Contractor has ceased to perform works as required by the terms of the Construction agreement, the Consultant must advise the Client/Employer and make relevant recommendations (including termination).
- (s) Where a Contractor is terminated the Consultant must provide the Client/Employer with a detailed report comprising i) complete inventory of material on site (for civil work projects); ii) an estimated value of the reported inventory; iii) photographs of the inventory and state of the incomplete works; iv) statement on the state of the incomplete works; v) details of the work done to the date of termination; and vi) details of what is required to complete the works.
- (t) Review and approve drawings, samples and other submissions of the Contractor only for specific conformity with the design concept of the Project and for compliance with the information given in the Contract Documents.
- (u) Review and approve request for Extension of time. The Consultant/Supervisor must present to the Client/Employer, the details of an Extension of Time request within two (2) weeks of receiving a request for Extension of Time.
- (v) Liaise with the Project Manager and relevant authorities and offer assistance so as to expedite the acceptance and takeover of the Works.
- (w) Ensure good occupational health and safety practices (including the wearing of personal protective equipment) are followed on-site during construction.
- (x) Make a final inspection of the completed Works, recommend the issuing or non-issuing of the completion certificate within 14 days, and prepare a Completion Report to the IA, the Beneficiary Community and the CDB, within 42 days of the end of work by the Construction Contractor, including therein:
 - (i) a checklist of defects and incomplete work with an expected date of completion and endeavour that the Contractor attends to all the items within the time period specified;
 - (ii) a Certificate of Practical Completion, a Certificate at making Good Defects, and a Final Certificate as required by the construction contract;
 - (iii) as-built drawings and financial statements setting forth the total cost of all elements of the Works (financial statements will not be required for the completion report for the Beneficiary Community);
 - (iv) the principal design criteria used, a brief history of the construction work, and recommendations as to the future maintenance of the more complex components of the Works;
 - (v) Maintenance Plan to promote, organise and execute routine maintenance works which includes maintenance of building services systems (electrical, plumbing, rainwater catchments, drainage, and sanitation components where relevant) and how to manage this process; and

- (vi) One (1) hard copy and one (1) electronic copy of the Completion Report shall each be sent to the CDB and the Designated Representative of the Beneficiary Community and One (1) hard copy and one (1) electronic copy thereof shall be sent to the BNTF IA.

5. COMMUNITY ENGAGEMENT AND BENEFITS

5.01 The Consultant shall provide the following professional services for engagement with the Beneficiary Community (men, women, and other social groups where relevant) during the sub-project implementation:

- (a) in consultation with the BNTF IA ensure community engagement (participation, communication, education and awareness, resilience building) during the execution of services up to completion;
- (b) review the community needs and assets assessment (CNAA), sub-project profile, environmental screening checklist and any other appraisal documentation outlining the needs to be addressed and the forms of capital to be considered during the implementation of the sub-project;
- (c) provide any labor opportunities, as stipulated in the sub-project profile, recognising time implications for both women and men; and
- (d) integrate any community commitments to volunteering and other contributions in the activity plan for the Works.

6. REPORTING AND ACCOUNTABILITY

6.01 The Consultant shall contribute to the BNTF sub-project monitoring process and ensure timely completion of acceptable output and outcomes focused reports, complying with the following requirements:

- (a) Complete progress and completion reports according to the reporting template provided by the CDB and based on a timetable to be agreed with the IA and the CDB, to inform the IA's sub-project monitoring and completion reports.
- (b) Provide details of labour opportunities and other employment generated for community residents (women, men, youth) or members of organisations.
- (c) Proactively communicate implementation challenges, problems and risks immediately to the IA and the CDB, while taking necessary steps to address these in keeping with the professional services.
- (d) Notify Client/Employer timely if community contribution is not being performed.
- (e) Audit, evaluate and report on the sub-projects' environmental and social management performance based on the BNTF Environmental and Social Guidance Manual.

7. QUALIFICATIONS AND EXPERIENCE

7.01 The consulting team should consist of persons having appropriate professional and academic qualifications and have relevant experience in the areas of architecture, civil engineering and construction supervision. Specific experience in community development in the Caribbean will be an asset.

Consulting Team Requirements		
Position	Qualifications	Experience
Civil Engineer	Bachelor's degree in Civil Engineering	10 years' experience working in the construction industry on similar assignments.
Cost Consultant/Quantity Surveyor	Bachelor's degree in Civil Engineering, or Quantity Surveying	8 years' experience working in the construction industry on similar assignments.
Site Clerk	Associate Degree in Building Construction or any other equivalent	5 years' working in the construction industry on similar assignments.
Environmental Specialist (as required)	Bachelor's degree in Environmental Science/Studies	8 years' experience working on environmental and social assessments, and monitoring and reporting on environmental and social impacts of projects.

8. COMMENTS BY THE CONSULTANTS

8.01 The Consultant is requested to make comments on, and suggestions for, improvements to these Terms of Reference. The financial implications, if any, of these recommendations should be indicated separately in the Financial Proposal.

9. DURATION OF THE CONSULTING ASSIGNMENT

[Insert duration of assignment]

10. DELIVERABLES

10.01 The Consultant will present one (1) hard copy and/or one (1) electronic copy of each report to the BNTF IA, and one (1) electronic copy of each report to the CDB. Copies of all data used in the preparation of the reports shall also be submitted. The BNTF IA and the CDB will forward comments on each report to the Consultant within two (2) weeks of receipt. These reports are as follows:

(a) Preliminary Design Report

The report will, *inter alia*, present: the preliminary results of the design process; alternatives to be considered for the sub-project sites and recommendations for the preferred options; and draft site specific ESMPs. Survey results, together with all preliminary design assumptions, technical justifications and estimated costs are to be presented for approval by the BNTF IA and the CDB no later than six (6) weeks after the signing of the contract.

(b) Final Design Report

The report will, *inter alia*, present the final results of the design process and incorporate the selected options and comments by the IA and CDB. All final design assumptions, calculations, drawings, specifications, Bills of Quantities, site specific ESMPs and any other necessary tender documents are to be presented for approval by the BNTF IA and the CDB no later than four (4) weeks after the BNTF IA instructs the Consultant to proceed to the Final Design Stage.

(c) Monthly Reports (Supervision Services)**(i) Progress Report**

The Consultant will, no later than the specified date of each month, prepare a progress report for each Works contract summarising the work accomplished for the preceding month. The report will outline any problems encountered (administrative, technical, or financial) and give recommendations on how these problems may be overcome. The reports will detail progress of ongoing works, include analysis and summaries of all tests results, and shall record the status of payment of all contractor's monthly certificates, of all claims for cost or time extensions, minutes of site meetings, and actions required by the BNTF IA or other stakeholder to permit unconstrained works implementation.

(ii) Report on Environmental and Social Performance

The Consultant will, no later than the specified date of each month, prepare Reports on Environmental and Social Performance for each Works contract, outlining any environmental and/or social issues over the reporting period and assessing the level of compliance of the contractor with the sub-project ESMP. The Consultant shall report and advise on the need for corrective actions, based on any issues noted and project-related complaints received; and shall report any unintended actions (positive and negative) and residual issues over the reporting period.

(d) Completion Reports

The Consultant will prepare a comprehensive Completion Report for each of the Works contracts, which reaches substantial completion during the period of the services. These reports must be submitted within 28 days after the completion certificate of each contract, and shall include, *inter alia*, a summary of the method of construction, the construction supervision performed, actual versus planned implementation progress and costs, quality assurance and quality control results, technical issues addressed and recommendations for future projects of similar nature, as-built drawings, and the Maintenance Plan.

11. TERMS OF PAYMENT

11.01 The payment schedule is as specified below and summarised in tables below:

DESIGN SERVICES – PAYMENT OF PROFESSIONAL FEES

<i>Preliminary Design – 30%</i>	Upon the completion, submission and acceptance of Preliminary Design, Draft ESMP, Estimate, and Report (Including topographic surveys if required, geotechnical data) and all other tasks described in the TOR, to the entire satisfaction of the Client.
<i>Final Design – 60%</i>	Upon the completion, submission and acceptance of Final Design Report, Final ESMP, Bidding Document inclusive of Final Drawings, Bills of Quantities, Specifications, Schedule of Materials (as required), Charts, etc.
<i>Final Design Payment – 10% (Pre-construction Services)</i>	Upon the completion of the Pre-construction Services, that end at the award of construction contract.
<i>Reimbursable Expenses</i>	Payment for reimbursable expenses including travelling will be made upon <ul style="list-style-type: none"> (a) submission of detailed invoices (b) supporting bills/receipts/documentations
<p><i>NOTE: Design Stage</i></p> <p>Incomplete/substandard submissions will not be accepted. Reports must be submitted as per deadlines in contract. Payments will only be made upon the submission of deliverables. The payment to the Consultant is a FIXED FEE together with reimbursable expenses and will be on a stage and performance basis only. All payments will be made within 28 days of approval.</p> <p>Payment for reimbursable expenses including travelling will be made upon submission of detailed invoices and will also be in conjunction with the above payment schedule during the Design and construction contract period.</p> <p>For Design, Penalties of 2% deductions per 5 days will be applicable for late submissions up to a maximum of 10% of the contracted total of the Professional fees.</p>	

**TECHNICAL INSPECTION / SUPERVISION SERVICES –
PAYMENT OF PROFESSIONAL FEES**

<i>Supervision</i>	Payment for Technical Inspection Services shall be made on a monthly basis commencing one (1) month after the start of the construction Works, upon receipt of the Monthly Progress Reports, including minutes of site meetings, Reports on Environmental and Social Performance, and submission of invoice(s) by the Consultant. The amount of each payment due to the Consultant shall be in proportion to the value of the construction Works carried out in relation to the total cost of the construction Works, provided, however, that an amount of 5% will be retained until submission of the Project Completion Report, acceptable to the IA and CDB, and an additional 5% will be retained
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	until the submission of the defects liability certificate.
	Note: Monthly reports are due on or before the 10th day of each month for the preceding month. Failure to submit monthly reports will result in a 1% deduction per 5 days after the report is due and the deductions will not be reinstated.
<i>Reimbursable Expenses</i>	Payment for reimbursable expenses including travelling will be made upon submission of detailed invoices, supporting bills/receipts/ documentations.
	Monthly reports are due on or before the 10th day of each month for the preceding month. Failure to submit monthly reports will result in a 1% deduction per 5 days after the report is due and the deductions will not be reinstated.

DRAFT TERMS OF REFERENCE
PROJECT PREPARATION SPECIALIST

1. JOB SUMMARY

1.01 The Project Preparation Specialist (PPS) works as a consultant reporting to the Project Manager (PM) and is responsible for assisting with the preparation of BNTF sub-projects that satisfy quality at entry standards for appraisal.

2. DUTIES

2.01 The duties of the PPS include:

- (a) Assisting the IA with the preparation of BNTF sub-projects from identification (only documentation is the concept note) to fully prepared sub-projects by liaising with project sponsors and beneficiaries, applying best practice, being practical and innovative, holding extensive discussions, working with templates, developing all required analyses, and producing a project report to BNTF standards and formats.
- (b) To work along with the Community Liaison Officer and Project Engineer to produce a project report on the status of implementation of projects for submission to the Project Manager and CDB.

3. QUALIFICATIONS

3.01 The PPS will hold formal qualifications to Master's Level, which should include a qualification in education, engineering or finance. Specialisation in either community infrastructure projects or livelihoods projects is required. A minimum of 10 years' experience working in project preparation is desirable, ideally for poverty reduction projects. Knowledge of the region and its project potential is essential.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis: They should reflect the above tasks and include:

- (a) the number of sub-projects prepared per annum;
- (b) the average processing time per sub-project preparation task;
- (c) the quality of prepared sub-projects as measured by 'soft assessment' criteria; and
- (d) the potential impact on poverty reduction (sum of all prepared sub-projects' forecast impact per annum).

DRAFT TERMS OF REFERENCE
IMPLEMENTATION SUPPORT SPECIALIST

1. JOB SUMMARY

1.01 The Implementation Support Specialist (ISS) works as a consultant reporting to the Project Manager and is responsible for implementing BNTF sub-projects to best practice standards so that they can achieve maximum outcomes and impacts as quickly as possible.

2. DUTIES

2.01 The duties of the ISS are:

- (a) Implementing BNTF sub-projects from CDB approval to fully operational sub-projects by liaising with project sponsors and beneficiaries, applying best practice, being practical and innovative, and ensuring that solutions to problems and delays are found.
- (b) To work along with the Community Liaison Officer and Project Engineer to produce monthly reports on the status of implementation of projects for submission to the Project Manager and CDB.

3. QUALIFICATIONS

3.01 The ISS will hold formal qualifications to Master's Level, which should include a qualification in engineering or finance. Specialisation in either community infrastructure projects or livelihoods projects is required. A minimum of 10 years' experience working in project implementation and procurement is desirable, ideally for poverty reduction projects. Knowledge of the region and its implementation constraints (few small contractors etc.) is essential.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis: They should reflect the above tasks and include:

- (a) the number of sub-projects implemented per annum;
- (b) the average implementation time per sub-project;
- (c) the quality of sub-project operations as measured by specific criteria; and
- (d) the impact on poverty reduction of the implemented sub-projects.

DRAFT TERMS OF REFERENCE BUSINESS DEVELOPMENT CONSULTANT
PROJECT PREPARATION SPECIALIST

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF) Programme is a grant-funded initiative of the Caribbean Development Bank (CDB) which started over 45 years ago and is now in its Tenth Phase. BNTF is one of the CDB's key instruments for addressing poverty reduction by providing access to basic public services through the provision of social and economic infrastructure and the development of skills to enhance employability, community management and engagement. The eleventh phase of BNTF Programme (BNTF 11) will continue to assist poor and vulnerable communities in nine BNTF Participating Countries (PCs), vis., Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname.

1.02 Each PC has an established Implementing Agency (IA), which reports to an executing ministry, and is responsible for the administration of sub-projects in the respective country. Sub-projects are implemented under tripartite agreements between the beneficiary community, the responsible public or civil society entity and the IA. Sub-projects are approved by an Oversight Entity (OE) while the IA manages a portfolio of sub-projects as part of the Country Project. The core IA staff includes a Project Manager (PM), a Project Engineer (PE), a Community Liaison Officer (CLO), and an Administrative/Accounting Officer (AO).

1.03 BNTF 10 focuses on three key sectors/areas: Education and Human Resource Development (including citizen security, youth at risk, livelihoods, and micro-enterprise development); Water and Sanitation and Basic Community Access and Drainage. The design of the sub-projects ensures participation by communities and transparency in community decision-making in the identification and priority setting processes.

1.04 A strategic approach which includes an emphasis on livelihoods across the PCs was introduced under BNTF 9 and is being further strengthened under BNTF 11. This approach has enhanced the transformative effects of the Programme at the household level and across vulnerable groups by expanding the broad-based orientation of the BNTF beyond public infrastructure interventions and skills training. Moreover, over the past cycle the PCs have been impacted by several crises arising from worsening climatic conditions and increasing health challenges such as COVID 19 and Dengue which disrupt lives and livelihoods sometimes over extended periods. Livelihoods enhancement interventions focus on building resilience against these threats as well as expanding income generation options, increasing earnings, expanding access to select assets and overall strengthening the overall business development acumen of beneficiaries.

1.05 CDB now seeks to engage a Business Development Consultant - Project Preparation Specialist (PPS) for preparing BNTF Livelihoods sub-projects to the highest best practice standards and to the point where they can be appraised.

2. OBJECTIVE

2.01 The objective of this consultancy is to catalogue community livelihoods baselines and prepare Livelihoods sub-projects based on sub-projects briefs provided by the IA.

2.02 Specifically, the Consultants shall:

- (a) Produce a livelihoods baseline assessment for targeted area of intervention(s).
- (b) Develop the sub-projects to be able to inform the Sector Portfolio where permanent infrastructure is not required
- (c) Develop the sub-projects to provide information for the engagement of technical consultants where permanent infrastructure is required.

3. SCOPE OF WORKS

3.01 The consultancy should be conducted over a period of not more than 10 weeks, representing a maximum of 30 working days. The consultant will provide technical support in the preparation of the BNTF Livelihood sub-projects under the guidance and supervision of the BNTF team at CDB.

3.02 The consultant will develop the sub-projects in consultation with key stakeholders in country. The following are the primary activities of the consultancy:

- (a) to conduct a livelihoods baseline assessment of the targeted district(s)/ Region(s)/ communities;
- (b) to prepare BNTF sub-projects from the idea point (only documentation is the concept note) to fully prepared sub-projects by liaising with project sponsors and beneficiaries, applying best practice, being practical and innovative, holding extensive discussions, working with templates, developing all required analyses, and producing a sub-project report, for each sub-project, to BNTF standards and formats, and
- (c) to develop cost estimates for the respective sub-projects.

4. REPORTING REQUIREMENTS

4.01 The Consultant will carry out the assignment over a maximum 40 days, during a period of 14 weeks, and report to CDB (Operations Officer in the BNTF Unit) and IA in Country. The Consultants will:

- (a) Provide CDB with one hard copy and an electronic version in Microsoft Word and Excel software packages of:
 - (i) an Inception Report/Work Plan with timelines for the completion of the subproject reports within one week of the signing of the contract;
 - (ii) Draft Livelihoods baseline assessment report;
 - (iii) the Draft reports for the livelihoods sub-projects within six weeks after receiving approval of the Inception Report/Work Plan from CDB. This report should include an assessment of the current livelihoods situation pertinent to each sub-project as well an assessment of the market; and
 - (iv) the Final livelihoods documents within one week of receiving comments from CDB and IA on the Draft.

5. METHODOLOGY

5.01 The Consultant may be required to travel to the country and work with the BNTF IA which includes site visits to the respective sub-project sites and meet with the beneficiaries. Discussions and consultations should be held with all relevant stakeholders, including Community-based organisations who are likely to be play a role in the implementation of the sub-projects.

5.02 A review of previous studies or works should be conducted to obtain feedback obtained on the findings and recommendations.

6. IMPLEMENTATION ARRANGEMENTS

6.01 The Consultant will be responsible for air fares and accommodation in country and overall preparation of the assignment (site visits, inspections, data collection etc.). In-country travel to sub-project sites will be the responsibility of the IA.

7. QUALIFICATIONS AND EXPERIENCE

7.01 The PPS will hold formal qualifications to master's Level, which should include a qualification in education, business development, development studies, entrepreneurship or finance. Specialisation in either Business Development, entrepreneurship or livelihoods projects is required. Should have knowledge of agriculture and non-agriculture types of livelihoods. A minimum of 10 years' experience working in the preparation of poverty reduction projects is desirable. Knowledge of the region and its project potential is essential.

DRAFT TERMS OF REFERENCE
PSYCHOSOCIAL SUPPORT CONSULTANT

1. BACKGROUND

1.01 The Basic Needs Trust Fund is a grant-funded Programme of the Caribbean Development Bank (CDB) with its genesis in 1979. Currently in its eleventh phase (BNTF11), the BNTF Programme remains one of the Bank's primary instruments for addressing poverty reduction by providing access to basic infrastructure and services in rural and urban communities, across the Caribbean. The Programme is designed to assist poor and vulnerable communities to improve their access to basic public services through the provision of basic social and economic infrastructure and the development of skills to enhance employability, community management and engagement. BNTF 11 focuses on key sectors/strategic areas: Education and Human Resource Development (EHRD) including Livelihoods Enhancement; Basic Community Access and Drainage Improvement; and Water and Sanitation Systems Enhancement. This programme stretches across nine Participating territories consisting of Barbados, Belize, Commonwealth of Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname.

1.02 In the BNTF participating countries the cohort of youths, especially those at risk is growing with young people becoming increasingly disengaged. This situation is characterised by elevated unemployment rates among the Region's youth. For those young people who are primarily at risk, their chances at optimising opportunities or overcoming challenges are often delayed as compared to the national trends. This coalescence of factors affecting youth, particularly in the context of dynamic labour market conditions and increased vulnerability at the household level has signalled the need for additional support for this segment of the population if it is to be positioned to benefit fully from investments.

1.03 Moreover, with the onslaught of the impacts of climatic shocks and others such as COVID 19 with their attendant social dislocation many people especially the most vulnerable have become disoriented and less able to deal with these significant changes. This affects the ability to really benefit from targeted recovery programmes and to be able to resume normal activities critical to ensuring their overall well being as well as that of their families. Under BNTF 11, actions will be more oriented to vulnerable people inclusive of youth and women, who often experience stressors related to poverty, hazards and financial insecurity. The importance of anticipating the challenges that may arise during the rollout of interventions which may block or limit beneficiaries' ability to grab opportunities cannot be over emphasised as these may deepen of harm and economic loss but also widen social inequality. Prolonged unemployment, for example, may lead to feelings of hopelessness and depression. Additionally, toxic domestic situations such as abuse may lead to high levels of stress, emotional turbulence, disruptive or anti-social behaviours or even social withdrawal.

1.04 In order to create a holistic approach, the BNTF IA is engaging Psychosocial Support Consultant - Counsellors to provide gender-specific and targeted psychosocial support and guidance for vulnerable people participating in human resource development and livelihoods interventions to facilitate successful negotiation of individual and group challenges and foster completion of said activities. The aim is to provide an avenue for checking on the welfare and general well-being of participants, create a platform for these participants to voice any concerns or challenges that they might be facing in a secure, confidential, and supportive environment and provide relevant support to help them to bypass/overcome obstacles.

2. OBJECTIVE

2.01 To engage the services of a Psychosocial Support Consultant-Counsellor to carry out an assessment of the general psycho-emotional health, social wellbeing and needs of assigned groups of participants,

through such activities as focus group discussions, group activities. This will also include the provision of necessary services inclusive of treatment, guidance, and referrals. The Psychosocial Support Consultant will report on his or her activities and progress to the Project Manager.

3. SCOPE OF SERVICES

3.01 The Psychosocial Support Consultant will be embedded within the BNTF IA. The Psychosocial Support Consultant will undertake the following specific tasks/activities:

- (a) Perform psychological assessments (focus group, individual or otherwise), counselling and other psycho-social services to project beneficiaries. This aspect would include some basic diagnostic testing and specified sessions with the group/individuals. Primary health screening should be facilitated.
- (b) Following assessment, provide both general and gender and situation specific guidance and support to participants, this could include the development of care plans/life plans for beneficiaries with acute needs, individual sessions, group sessions or other approaches.
- (c) Determine the need for further specialised treatments and referrals and monitor any required care interventions in collaboration with other agencies/medical staff.
- (d) Conduct at least two training activities with actors who work with youth at risk at the community level in the areas of Psychological First Aid and Trauma-informed care and any other areas deemed necessary.
- (e) Create a file on each of the participants within the programme and ensure that the records are duly maintained with special focus on participants with acute needs.
- (f) Provide feedback to the Project Manager on issues that might affect the smooth implementation of the Project.
- (g) Ensure that attendance sheets are filled out at every session and maintain confidential records on beneficiary interactions.
- (h) Serve as an ex-officio member of the Project Steering Committee.
- (i) Provide critical incident stress debriefing.
- (j) Provide monthly narrative and statistical reports to the Project Manager.
- (k) Produce final report.

4. REPORTING REQUIREMENTS

4.01 The Counsellor will work in close collaboration with the focal point for each sub-component of the Project and will report directly to the PC. Reporting will commence within one month of Programme commencement, with the Final Report to be submitted two weeks after the completion of the Programme.

5. QUALIFICATIONS AND EXPERIENCE

5.01 A minimum of a graduate degree in psychology or counselling is required. Psychosocial training and/or experience with trauma-informed care is essential with three to five years related work experience. Experience working with at-risk youth or young men and women in conflict with the law is important. Possession of good communication skills, interpersonal relationship skills, training/facilitation skills, computer skills, collaborative, cooperative and coordination skills would be advantageous. Must have the ability to work with minimum supervision and under pressure. Should have the capacity to work in an interdisciplinary team and must have a very developed understanding of the cultural dimensions of Saint. Lucia, including deep-rooted gender ideologies. Must be able to keep the information confidential.

6. DURATION

6.01 The assignment is expected to last for no more than eight months.

GENDER MARKER

Project Cycle Stage	Criteria	Score
Analysis: Introduction/Background/Preparation	Consultations with relevant categories of males and females and relevant gender-related public/private sector organisations and Non- Governmental/Community-Based Organisations will take place. Socioeconomic, Sector and/or Institutional analysis considers gender risks and/or gender disparities that impact the achievement of project outcomes.	0.5
		0.5
Design: Project Proposal/ Definition/ Objective/ Description	Project interventions/policies address existing gender disparities.	0.5
	Project objective/outcome includes the enhancement of gender equality or the design of gender-responsive policies or guidelines.	0
Implementation: Execution	Implementation arrangements include either: Capacity building initiatives to enhance gender mainstreaming of the executing and/or implementing agency Or Active participation of representatives of gender-relevant stakeholders in project execution.	0.5
	Terms of Reference of consultancy/project coordinating unit/project management unit includes responsibilities and resources, including budgets for gender mainstreaming.	0.5
Monitoring and Evaluation: Results- Monitoring- Framework (RMF)	Collection of sex-disaggregated data is part of the project.	0.5
	At least one gender-specific indicator at the outcome and/or output level in the RMF.	0.0
Score		3.0
Gender Mainstreamed (GM): The BNTF programme has the potential to contribute significantly to gender equality.		

BNTF 11 PROGRAMME REPORTING SCHEDULE

Report	From	Frequency	Submission
Country Policy Framework (CPF)	PM	Once	August 31, 2025.
Sector Portfolio of sub-projects	PM	Periodic as prioritised in CPF	Ongoing
Sub-project Monitoring Reports (SPMR)	PM	Periodic as outlined in Results Matrix	Within 21 days of milestone events
Minutes of OE meetings	PM	Quarterly	Within 14 days after the end of each quarter
Status of Country Project	PM	Quarterly	Within 14 days after the end of each quarter
Procurement Plan	PM	At least annually for the following calendar year	November 30, of each year
Annual Work Plan and Budget (AWPB)	PM	Annually for the following calendar year	November 30 of each year
Quarterly Report (QR)	PM	Quarterly for the previous quarter.	Within 5 days of the end of the previous quarter.
Sub-project Completion Report (SPCR)	PM	After completion of each sub-project	Within 30 days after the completion of each subproject.
Financial Audit	Independent Auditors	Annually for calendar	Within 120 days of the end of each fiscal year.
Performance Audit	Independent Auditors	Biennially	Within 240 days of the end of June, 2026 and July 2028
Environmental and Social Performance (ESPR) Report	PM	Twice	August 31, 2027, and August 31, 2028.
Mid-Term Evaluation (MTE)	Independent Consultants	Once	By February 28, 2029.
Country Project Completion Report (CPCR)	PM	Once	Within 3 months of the completion of all sub-projects.
Programme Closing Report	Independent Consultants	Once	Within 6 months after CDB's TDD

Note: Report formats to be agreed with CDB. PM - Project Manager / Coordinator OE - Oversight Entity

BNTF 11 SAMPLE OUTCOMES AND OUTPUTS

SECTOR/ PROGRAMME AREA	OUTCOMES	OUTPUTS – SDF & BNTF INDICATORS
EDUCATION	Improved access to quality education and HRD services	Classrooms and educational support facilities built or upgraded according to minimum standards (number), of which ECD/Primary/Secondary
		Beneficiaries of skills training activities (number female by age)
		Beneficiaries of skills training activities (number male by age)
		Students benefitting from improved physical classrooms conditions or enhanced teacher competence, or school infrastructure (number female)
		Students benefitting from improved physical classrooms conditions or enhanced teacher competence, or school infrastructure (number male)
		Teachers and Principals Trained/Certified (number female by age) ECD/Primary/Secondary
		Teachers and Principals Trained/Certified (number male by age) ECD/Primary/ Secondary
LIVELIHOODS	Livelihoods and employment opportunities enhanced	Business plans approved (number)
		Value of assets transferred (\$)
		Change in income (%) (male by age)
		Change in income (%) (female by age)
WATER AND SANITATION	Improved access to quality water supply and sanitation services	Households with access to water supply (number by head of household)
		Installed water capacity (m³)
		Water supply lines installed or upgraded (km)
TRANSPORT AND STORAGE	Improved access to basic services	Secondary and other roads built or upgraded (km)
		Beneficiaries of community infrastructure (number female by age)
		Beneficiaries of community infrastructure (number male by age)
		Beneficiaries of road projects (number female by age)
		Beneficiaries of road projects (number male by age)
		Community infrastructure built/upgraded (number)
YOUTH AND CITIZEN SECURITY	Citizen security enhanced Sustainable youth employment increased	Crime and violence prevention activities funded (number)
		Youth gainfully employed (number) (m/f by age)
		Youth micro-enterprises and other initiatives funded and registered (number) (m/f by age)
		Youth trained in business and technical skills (number) (m/f by age)
ENERGY GENERATION AND SUPPLY	Enhanced use of renewable energy technology	Conventional or renewable power generation capacity installed (MW) of which renewable (MW) Energy savings as a result of EE/RE interventions (GWh)

DRAFT TERMS OF REFERENCE
UPDATE OF THE COUNTRY POLICY FRAMEWORK

1. BACKGROUND

- 1.01 BNTF is a cyclical programme that was launched in 1979. It is the main grant-funded programme of the CDB for pursuing poverty reduction in its Borrowing Member Countries (BMCs). The Programme targets the poor and vulnerable, through a community development modality that aims to improve the lives and livelihoods of beneficiaries in BNTF Participating Countries (PC) by improving basic economic and social infrastructure and services and increasing opportunities for economic activity through skills training, capacity building and institutional development support. The Programme is distinguished by its community-targeted, demand-led participatory approaches to the engagement of vulnerable segments of society for sustained people-focused development, which reflects the strategic sector priorities as defined by the respective PCs. The BNTF Programme also includes a Regional Coordination component which is managed by CDB and supports programme implementation and management; and monitoring and evaluation (M&E).
- 1.02 Each PC has an established Implementing Agency (IA) or Executing Agency (EA) which reports to an executing ministry and is responsible for the administration of sub-projects in the respective country. Sub-projects are expected to be implemented under tripartite agreements between the beneficiary community; the responsible private/ public partnership, the public or civil society entity; and the IA. Sub-projects are approved by an Oversight Entity (OE) while the IA manages a portfolio of sub-projects as part of the Country Project. The core IA/EA staff includes a Project Manager (PM), a Project Engineer (PE), an M&E Officer, a Community Liaison Officer (CLO), and an Administrative/Accounting Officer (AO).
- 1.03 BNTF focuses on three key sectors/areas: Education and Human Resource Development (including citizen security, youth at risk, livelihoods and micro-enterprise development); Water and Sanitation; and Basic Community Access and Drainage. The design of the sub-projects ensures participation by key stakeholders and transparency in community decision-making in the identification and priority-setting process. Stakeholders include such potential eligible partners such as communities, NGOs, charities and civil society organisations, business associations, chambers of commerce and private companies through their corporate social responsibility programmes.
- 1.04 A Country Policy Framework (CPF) documentation will reference source material such as CDB's report on poverty and equality¹, Country Poverty Assessment data, National Poverty Reduction Strategies, the Country Gender Assessments, the UNDP Caribbean Human Development Reports, and the IDC Country Reports. Overall, efforts are being made at the country level to ensure that all the SDGs and cross-cutting areas, such as gender equality and environmental sustainability, inclusive of climate change and disaster risk management, are integrated within sub-projects that contribute to the enhancement of the countries' human development outcomes.
- 1.05 Going forward under the next cycle of the BNTF Programme, all PCs are required to update its CPF as a condition for the allocation of BNTF funding. The updated CPF is owned by Government and is a crucial starting point in the development of the country's BNTF portfolio. The CPF is intended to outline a simple, evidence-based, sex-disaggregated information including a resource allocation and financing plan.

¹ Changing Nature of Poverty and Inequality in the Caribbean: New Issues New Solutions, CDB, March 2016

2. OBJECTIVE

2.01 The objective of this consultancy is to inform evidence-based prioritisation of the PC's BNTF resources through the updating of the country's CPF.

3. SCOPE OF WORKS

3.01 Each consultancy in-country should require a maximum of fifteen (15) working days over a period of nineteen (19) weeks. The consultant will provide technical support for the updating of the BNTF CPF under the guidance and supervision of the BNTF team at CDB.

3.02 The consultants will update the CPFs in consultation with key stakeholders in-country including private sector entities supporting activities in the sector. The development of the CPFs will focus on matching resources to poverty reduction priorities in specific sectors and other key areas to contribute to a more streamlined appraisal and preparation process in keeping with the CPF Template. The BNTF programme will support opportunities for self-employment and economic empowerment particularly targeting women and youth. The following are the primary activities of the consultancy:

- (a) to corroborate data and information from source materials such as CDB's report on poverty and equality², the Country Gender Assessments, the UNDP Caribbean Human Development Reports, and the IDC Country Reports, paying particular attention to capturing sex-disaggregated data. Desk review and primary research using a participatory approach will be utilised ensuring that there is an appropriate engagement of all key stakeholders;
- (b) to develop along with the IA/EA staff a coherent and comprehensive portfolio of prioritised indicative sub-projects to be implemented under the subsequent SDF cycle, referencing the national strategic plan that identifies and outlines the areas of priority as well as applying the CDB-developed Prioritisation Tool to the list of sub-projects, as required; and
- (c) to develop a financing plan for the components of the Country Project Resource Allocation.

4. REPORTING REQUIREMENTS

4.01 The Consultants will carry out the assignment over a maximum of ten (10) days, during a period of eight (8) weeks, and report to CDB (Operations Officer in the BNTF Unit) and IA/EA in Country. The Consultants will:

- (a) Provide CDB with an electronic submission in Microsoft Word and Excel software packages of an Inception Report/Work Plan with timelines for the updating of the CPF for CDB's and IA/EA's approval within one week of the signing of the contract. The CPF template is appended hereto as an annex.
- (b) Provide CDB with an electronic submission in Microsoft Word and Excel software and in the online BNTF 365 platform of the Draft updated CPF within six weeks after receiving approval of the Inception Report/Work Plan from CDB.

² Changing Nature of Poverty and Inequality in the Caribbean: New Issues New Solutions, CDB, March 2016

- (c) Provide CDB with an electronic submission Microsoft Word and Excel software and in the online BNTF 365 platform of the Final Updated CPF document within one week of receiving comments from CDB, IA/EA and OE on the Draft.

5. QUALIFICATIONS AND EXPERIENCE

5.01 Applications are invited from citizens and legal residents of CDB member countries. Suitable applicants should meet the following criteria:

- (a) Possess advanced qualifications in Economics, Sociology, Social Development and/or any other social science.
- (b) Have over five (5) years' experience working as a poverty analyst/poverty reduction specialist or development specialist with specific competencies and experience in participatory research, community-led development and empowerment, and monitoring and evaluation.
- (c) Knowledge and practical work experience in the Caribbean region.

COUNTRY POLICY FRAMEWORK TEMPLATE**1. INTRODUCTION**

1.01 The Caribbean Development Bank (CDB) requires each Basic Needs Trust Fund (BNTF) participating country (PC) to update its Country Policy Framework (CPF) for the succeeding cycle of the BNTF Programme. The BNTF Country Projects aim to achieve poverty reduction. As in the current BNTF 10 Programme the updated CPF is expected to be an evidence-based framework relating closely to wider national policies aimed at reducing poverty. The updated CPF would reflect on the most recent data derived from national poverty reduction strategies, economic and sector strategy papers, recent CDB country strategy papers, consultations and other relevant sources. The updated CPF will serve to operationalise the country strategy by ‘converting’ it to a practical set of sub-project priorities that conform to overall policy priorities, with an attendant financing plan for the project cycle. Due consideration must be given to collaboration with key stakeholders and potential eligible partners such as NGOs, charities and civil society organisations, business associations, chambers of commerce and private companies through corporate social responsibility programmes. Analysis of gender gaps within and influencing sectors of consideration should be done leading to the identification of gender-specific activities for the sector. The maximum sub-project cost remains at one million United States Dollars.

2. STEPS TO UPDATING THE CPF

2.01 Like any planning exercise, the process of developing the framework paper is an integral part of its value. The following elements are essential:

- (a) Updating of the CPF is done under the direction of the Project Manager, BNTF and involves the entire team of the BNTF Implementing Agency (IA) or Executing Agency (EA).
- (b) The process is inclusive and consultative with all key stakeholders, including Government offices, communities, partners (co-financiers), and community representatives (or groups).
- (c) The updated CPF will draw on the active CPF for BNTF 9 and other works and avoid replicating what has already been done by other experts; hence the reference to Government strategies and CDB country strategies.

2.02 The value of the updated CPF is that it provides sector analyses and practical proposals for interventions in each sector such as:

- (a) Identification of non-sub-project components to support project implementation.
- (b) A prioritised pipeline of sub-projects with respective estimated costs, categorised under infrastructural and non-infrastructure sub-projects as follows:

Community Social/Economic Infrastructure

- (i) Water and sanitation
- (ii) Access roads
- (iii) Basic Schools
- (iv) Renewable energy and energy efficiency

Skills Training and Livelihoods

- (i) Asset distribution
- (ii) Access to credit
- (iii) Technical certified skills training, life skills, psychosocial support and mentorship/life coaching, and gender sensitisation
- (iv) Entrepreneurship, business, market, and enterprise life skills
- (v) COVID-19/natural disaster impact requiring an increased focus on livelihood initiatives and economic empowerment particularly targeted towards women and youth; and
- (vi) Improving the 'doing business' environment for the most vulnerable.

2.03 Identification of gender gaps and gender-specific activities in the sectors under consideration³.

- (c) Scheduling, disbursement forecast, and expected results in each sector detailed by subproject.

3. OUTLINE AND KEY COMPONENTS

3.01 The content and length of the updated CPF are standardised across PCs and the proposed outline is as follows:

Section	Max. Length (pages)	Source	Key Message/Value
1. Introduction/ Background	1	• BNTF 9 Staff Report	• Purpose of the BNTF Programme and history/achievement in the country.
2. The problem poverty	2	• Gov't Statistics • IA analysis • Statistics • Reports	• Causes, severity, incidence, and manifestations of poverty
3. The national strategy	1	(a) Poverty reduction strategy (b) CDB CSP (c) Eligible partners' strategies	(a) Priorities (b) Actions and approaches (c) Beneficiaries (d) Table 1 - also includes information from Section 5.
4. Sector Analysis	4	• Line ministries/entities or Reports	• For each sector: (a) status of the sector, (b) major gaps in the sector, (c) gender gaps in the sector ⁴ and (d) previous BNTF contributions to the sector. (i) Tables 2 and 3

³ Please note if an issue spans all sectors one activity covering all sectors to address the gap can be identified as non-subproject component.

⁴ Gender gaps can potentially be identified in the following areas of focus: access to services, access to decision-making, access to economic opportunities, prevention and response to gender-based violence and harassment, social and cultural norms.

5.	BNTF's strengths and priorities	2	<ul style="list-style-type: none"> • BNTF Strategy • IA analysis 	(a) Actions to achieve BNTF mission; and (b) BNTF's role relative to other agencies dealing with poverty reduction (summarised in Table 1).
6.	Outcome of consultations	2	<ul style="list-style-type: none"> • IA consultations 	<ul style="list-style-type: none"> • Summary of expectations and aspirations among stakeholders including awareness of BNTF projects. • Identification of community engagement needs and preferences. (Noting that community meetings may not be the preferred means of engagement). • Summary of potential partnership engagement opportunities by sector. (Table 4).
7.	Potential pipeline	1	<ul style="list-style-type: none"> • IA analysis 	<ul style="list-style-type: none"> • List of all proposed sub-projects prioritised and categorised by sectors (Table 5). • Indicative Results Monitoring Framework (Table 6).
8.	Action plan	3	<ul style="list-style-type: none"> • IA analysis 	<ul style="list-style-type: none"> • Proposed sub-project pipeline to achieve outcomes and outputs with implementation schedule (Table 7). • Gender Gaps and Activities (Table 8). • Community Engagement Plan (Table 9). • Estimated disbursements and timing (Table 10). • Risk and risk mitigation analysis (Table 11).
Total pages		18 (excluding Annexes)		

Table 1: Country Project Resource Allocation Matrix

Sector	National Poverty Reduction Strategy (NPRS)	NPRS Indicators and Targets	BNTF Interventions Impacting NPRS	Key Partners	Sector Allocation USD	Sector Allocation %
	Source: Goal/Impact:					
	Outcome:	Indicator: Target:				

Table 2: Main External Financing Sources and Projects by Sector

Sector	Donor	Project Name	Target Areas	Partner Institution	Project Amount (USD)	Duration

Table 3: BNTF Contribution in Previous Cycle by Sector

Sector	BNTF Cycle	Number of sub-projects	Outputs	Total BNTF Contribution (USD)	Direct Beneficiaries

Table 4: Summary of Potential Partnership Engagement Opportunities by Sector
(Populate this matrix with information from completed and ongoing partnership discussions).

Sector	Partner Name	Partner Contribution	Type of Contribution	Sub-project Supported	Engagement Duration

Table 5: Country Project Constituent List of Sub-projects

Sector	Sub-project Title	Priority Ranking	Indicative Cost)		Location	Area	Start Date	End Date	Estimated Duration (Months)	Size of Population (Male, Female)	Co-implementing Agencies ⁵	Community Contribution (Assets, Skills, Talent, etc.)
			Total	CDB Grant								

Table 6: Indicative Results Monitoring Framework for Sub-projects

Outcome										
Sector	Sub-project Name	Narrative	Indicator	Baseline	Target				Data Sources Reporting Mechanisms	Assumptions and Risks
					2025	2026	2027	2028		
Output										
Sector	Sub-project Name	Narrative	Indicator	Baseline	Target				Data Sources Reporting Mechanisms	Assumptions and Risks
					2025	2026	2027	2028		

⁵ Executing Bodies Implementing and Monitoring)

Table 7: Implementation Gantt (show start and end date as bar)

Activity	Start Date	End Date
Programme Approval CDB Board Approval Preparation of Grant Agreement Signing of Grant Agreement Grant Effective Date		
Country Project Preparation and Appraisal Procure Technical Consultants Procure Coordinators for Livelihood and Capacity Building Sub-projects Project Launch Workshop Preliminary Designs for EHRD Sector Preliminary Designs for BCAD Sector Preliminary Designs for WSSE Sector Preparation of Education Sector Portfolio Preparation of Water Sector Portfolio Preparation of Transport and Storage Sector Portfolio		
Implementation Education Sector Portfolio (No. of sub-projects) Water and Sanitation Sector Portfolio (No. of sub-projects) Transport and Storage Sector Portfolio (No. of sub-projects) Non-sub-project activity by sub-component Mid-term Evaluation		
Programme Closing Terminal Disbursement Date Submission of Country Project Completion Report		

Table 8: Gender Gaps and Activities

The identified gender gaps in the sector analysis should be included here and if possible one gender-specific sub-project/activity be identified to address the gap in the sector. (Note: at least one gender gap and gender activity is to be identified).

Focus Area ⁶	Gender Gap	Gender Activity ⁷	Sector/Component

⁶ Please refer to footnote 1 for areas of focus.

⁷ Gender-specific sub-projects for the sector or activities under non-subproject components.

Table 9. Community Engagement Needs and Preferences

(Provide a summary of the most suitable methods of engagement for identified categories of residents)

Category of Community Residents (women, men, youths, persons with disabilities, elderly, etc)	Engagement Methods (community meetings, fliers/notices, face-to-face, church services, sporting events, etc.)

Table 10: Indicative Financing Plan

Component	Sub-project Name/Activity	Estimated Disbursement – CDB Grant			
		2025	2026	2027	2028

Table 11: Risk Assessment

Risk Category	Risk Description	Mitigation Measures

DRAFT TERMS OF REFERENCE FOR THE OVERSIGHT ENTITY

1. INTRODUCTION

1.01 An Oversight Entity (OE), acceptable to the Caribbean Development Bank (CDB), will have overall responsibility for the execution of the Basic Needs Trust Fund (BNTF) Project in compliance with requirements, standards and covenants set out in the Grant Agreement between the Government and CDB. The Chairperson will report directly to the Permanent Secretary of the Executing Ministry.

2. OBJECTIVES

2.01 The objectives of the OE are:

- (a) To liaise with relevant Ministries/agencies/departments and other social partners and stakeholders, on national planning issues, constraints and priorities, in order to ensure that the social development and poverty reduction strategies of the country are aligned with the Country Policy Framework (CPF), developed to assist with the administration of the project.
- (b) To ensure that the Project is implemented in accordance with the Grant Agreement and the guidelines of the Operations Manual (OM) developed for the Project.
- (c) To ensure that the Project is undertaken in a participatory, gender-sensitive manner, ensuring that environmental concerns are appropriately considered, and that the Project reaches the intended beneficiaries/participants.
- (d) To ensure that Project resources are allocated and used efficiently.

3. COMPOSITION

3.01 The OE membership should be representative of those priority sectors identified for intervention in the CPF and crosscutting themes envisaged under BNTF 11. It is required that representation include, as a minimum, a representative of the Ministry of Finance and Planning, members of the line sectors involved according to portfolio priorities, a representative of the Non-Governmental Organisation (NGO) sector and a representative of the Chamber of Commerce. The Project Manager/Coordinator (PM), an ex-officio member, will serve as Secretary. Representatives of relevant BNTF sectors can participate in OE discussions on sub-projects when necessary. These representatives will not have voting rights. The Community Liaison Officer (CLO) shall attend meetings and report as necessary but shall be a non-voting member. A Recording Secretary shall be assigned to the PM/Coordinator to take minutes of the proceedings at all OE meetings.

4. REPRESENTATION AND DEPUTATION

4.01 For continuity, each ministry and organisation should nominate its OE representative and indicate an alternate member.

5. CHAIRPERSON

5.01 The Chairperson of the OE will be a representative from the Executing Ministry, but not the Permanent Secretary of that Ministry, unless CDB may otherwise agree.

6. ATTENDANCE BY NON-MEMBERS

6.01 Non-members of the OE including CDB staff, may attend meetings subject to approval of the Chairperson on a meeting-by-meeting basis. The BNTF Recording Secretary will attend all meetings of the OE.

7. MEETING FREQUENCY

7.01 The OE will meet at least quarterly, and more often as required. The Chairperson, or their designated representative, will convene the meetings. A quorum will consist of four members, two each from governmental and non-governmental representatives plus the PM and CLO.

8. RESPONSIBILITY

8.01 Following are the responsibilities of the OE:

- (a) Preparing and utilising the CPF prepared on behalf of and endorsed by the Government, as an objective guide to implement pro-poor, gender-responsive policy and achieve poverty reduction when allocating project resources for initiatives under BNTF.
- (b) Reviewing and approving revisions to the OM in consultation with CDB.
- (c) Reviewing and approving the Participating Countries' (PCs) Annual Work Plan and Budget, and Quarterly Report in consultation with CDB.
- (d) Selecting eligible sub-projects from among those proposed by community groups, NGOs, Community Based Organisations (CBOs) and Government, using the selection criteria specified in this Agreement, and the BNTF Prioritisation Tool as necessary. The OE must consider proposed sub-project profiles prepared in accordance with the OM. A sub-committee shall be established to conduct site visits at times and intervals determined by the PM in consultation with the OE Chairperson.
- (e) Approving other funding partners beside CDB as proposed by the Project Manager (PM) and advise Government to submit to CDB for approval by CDB.
- (f) Approving sector portfolios of eligible sub-projects and advise Government to submit such to CDB for its approval.
- (g) Approving any variations to the final list of sub-projects and advise Government to submit such to CDB for its approval.
- (h) Approval of TORs for the engagement of consultancy services.
- (i) Advising the Government on screening and selection of competent staff viz. PM/Coordinator, Community Liaison Officer, Project Engineer, Monitoring and Evaluation Officer, Administrative/ Accounting Officer, and other consultant specialists.
- (j) Maintaining a performance management system for managing and reporting on the performance of IA staff to ensure that the goal and objectives of the Project are efficiently achieved.

- (k) Establish the framework with each cooperating partner, for BNTF partnerships, with relevant Government Ministries/agencies/departments, for preparation of draft designs and indicative costs, implementation, monitoring and evaluation, and operation of the BNTF Project including review of progress reports.
- (l) Provide support to communities as well as the private sector to promote the long-term sustainability of the project.
- (m) Promote and direct the marketing of the BNTF Project, to ensure that the neediest communities and the most vulnerable and disadvantaged persons are appropriately targeted in the use of the project's resources.

DRAFT TERMS OF REFERENCE PROJECT MANAGER

1. JOB SUMMARY

1.01 The Project Manager (PM) will report to the assigned Operations Officer and/or Portfolio Manager at CDB, Barbados. He/she will lead the Basic Needs Trust Fund (BNTF) Implementing Agency (IA) and will be an ex-officio member and Secretary of the Oversight Entity (OE). Through the Chairperson of the OE, the PM will report on the day-to-day operations of the IA. The PM will be responsible for establishing and maintaining contact with the relevant government ministries, non- governmental organisations (NGOs), civil society organisations and the private sector and for negotiating integral partnerships. As head of the IA, the PM will have ultimate responsibility for managing project resources and all IA staff and supervising the implementation of all sub-projects.

2. DUTIES

2.01 The duties of the PM are:

- (a) Aligning the BNTF IA's work programme with the country's poverty reduction goals and relevant development strategies.
- (b) Assisting the OE and Government to develop and implement a Country Policy Framework (CPF) based on poverty reduction goals and national sector priorities and coordinate project activities with other similar donor-funded projects which address poverty.
- (c) Agreeing on quantified (non-subproject specific) annual targets and work plans in the context of the agreed strategy.
- (d) Coordinating the preparation of the portfolio of sub-projects for the approval by the OE and CDB, and proposing for consideration and approval by the OE, any other activities to be financed.
- (e) Managing, coordinating and supervising the IA team, including the Administrative/Accounting Officer, Community Liaison Officer, Project Engineer, Monitoring and Evaluation Officer and support staff, thereby ensuring sub-projects and other Project activities are in compliance with the policies and guidelines established for the Programme.
- (f) Identifying funding partners in consultation with the OE and CDB, managing day-to-day operational interactions, and reporting on partnership activities and achievements as part of the Annual Work Plan and Quarterly Report.
- (g) Submitting all financial and non-financial reports as per schedule, to the OE and CDB, on a timely and regular basis, detailing all past and planned activities.
- (h) Establishing and maintaining contact with all stakeholders, especially with the sponsoring Ministry/agency, other social partners and supervising consultants for efficient and effective delivery of project outputs.
- (i) Directing the planning, implementation, monitoring and internal evaluation of the BNTF Project and ensuring good governance.

- (j) Marketing BNTF activities to target groups as part of maintaining the BNTF's brand and profile in country.
- (k) Having responsibility for cost control and compliance with relevant standards and policies of the Programme.
- (l) Reviewing all contracts related to the hiring of staff, and the procurement of goods and services.
- (m) Supervision of all components, including ensuring that activities and procurement schedules are carefully planned and executed.
- (n) Establishing a database of gender-sensitive monitoring indicators which will be used to improve on subsequent designs. The date for data collection will be agreed and outlined in the OM for each type of sub-project.
- (o) Any other related duties that may be delegated by the OE.

3. QUALIFICATIONS

3.01 The PM is expected to have at least a Master's Degree in project management, development studies, social sciences disciplines, natural sciences or engineering and a minimum of 5 years' experience or a Bachelor's Degree and a minimum of 10 years' experience as a project manager. Expertise in the management of rural development projects and proficiency in computer skills are prerequisites. It would be advantageous if the PM has demonstrated competence in managing donor-funded programmes and the ability to effectively communicate with community groups, Government officials, donors, private sector representatives and NGOs. Knowledge of gender analysis and environmental sustainability are also desired. Good written and oral communication skills are required.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis:

- (a) the volume of sub-projects (number and value) planned and achieved;
- (b) the mix of sub-projects (sectors and beneficiaries) planned and achieved;
- (c) the cost-effectiveness of the IA (operational cost per dollar approved and disbursed);
- (d) funding partnerships formed (numbers, value); and
- (e) Government, partner and beneficiary feedback.

DRAFT TERMS OF REFERENCE
COMMUNITY LIAISON OFFICER

1. JOB SUMMARY

1.01 The Community Liaison Officer (CLO) will be responsible to the Project Manager (PM) for facilitating the active involvement of communities in the identification, formulation and implementation of all sub-projects funded by the Project. The CLO is expected to take the lead for the Implementing Agency (IA) team in project cycle activities related to skills training sub-projects.

2. DUTIES

2.01 The duties of the CLO are:

- (a) Marketing the BNTF Project and generating a pipeline of sub-projects, involving public relations, community consultations, calls for tender and other methods approved by the PM based on the policies and guidelines of the Programme.
- (b) Assisting in selecting sub-projects based on Programme guidelines and procedures and presenting same to the PM, Oversight Entity (OE) and CDB for approval.
- (c) Requesting the support of regional consultants in preparing selected sector portfolios as may be required.
- (d) Provide support to the Project Manager and/or Procurement Specialist in the conduct of the procurement functions of the IA.
- (e) Organising and conducting Community Needs and Assets Assessment (CNAA) for each selected sub-project and channelling field data into the M&E system.
- (f) Guiding the formation of Project Monitoring Committees (PMCs) for the implementation of each sub-project and preparing appropriate briefs to discuss with members of the community.
- (g) Supporting the PM in exploring areas of mutual interest and forging partnerships with private corporations, civil society organisations and public sector bodies.
- (h) Assisting the PM, other funding partners, other project sponsors, the regional consultants, the project engineer, the engineering consultant and the beneficiaries to prepare project documentation for submission to the OE and CDB for review and approval.
- (i) Collaborate closely with preparation and implementation specialists develop, finalise and implement interventions or assessments in relevant sector portfolios.
- (j) Liaise with co-implementing agencies to provide lending support and guidance to enhance the quality of implementation and ensure monthly reporting requirements are fulfilled. The CLO is to prepare quarterly reports in collaboration with the M&E Officer and a final report for each sector portfolio upon completion of all activities under that Portfolio.
- (k) Updating the data management systems with sub-project and sector portfolio information to facilitate the approval process.

- (l) Providing timely inputs to the PM for the planning process, specifically estimates of the number and value of sub-projects that could be expected over the planning period (annual).
- (m) Facilitating training and sensitisation on behalf of communities towards strengthening capacity of non-government organisations, community- and faith-based organisations and community leaders for providing quality inputs throughout the project cycle.
- (n) Assisting the relevant government departments to monitor post-implementation activities, in partnership with sponsoring agencies, and assist in the evaluation of social and economic impact of sub-projects, using participatory approaches.

3. QUALIFICATIONS

3.01 The CLO is expected to have at least a Bachelor's Degree in Sociology or Rural Development or in a related field with at least five years' relevant project experience working with rural communities and in the application of participatory methods. Proficient computer skills are required. Administrative and management competence would be an asset. Good written and oral communication skills are required.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis:

- (a) the volume of sub-projects (number and value) planned and achieved;
- (b) the mix of sub-projects (sectors and beneficiaries) planned and achieved; and
- (c) funding partnerships formed (numbers, value); and (d) partner and beneficiary feedback.

DRAFT TERMS OF REFERENCE
PROJECT ENGINEER

1. JOB SUMMARY

1.01 The Project Engineer (PE) will be responsible to the Project Manager (PM) for the preparation, formulation and implementation of all infrastructure sub-projects funded by the Project. The Project engineer is expected to take the lead within the Implementing Agency (IA) in project cycle activities related to infrastructure sub-projects.

2. DUTIES

2.01 The duties of the PE are to:

- (a) Assist the PM in processing sub-project applications by providing technical inputs for submission to the Oversight Entity (OE) for funding under the Project.
- (b) Prepare infrastructure sub-project profiles for approval by the OE and the Caribbean Development Bank (CDB) in accordance with the Operations Manual (OM), including the completion of various checklists such as those for the Environmental Impact Assessment/ Natural Hazard Impact Assessment and Disaster Risk Reduction.
- (c) Monitor sub-project contracting for the implementation of sub-projects by appointed contractors, being implemented by agencies or self-help; to be coordinated with the sponsoring agency and guided and administered by the technical consultants.
- (d) Supervise and report on all aspects of the work of technical consultants engaged for the design and implementation of infrastructure sub-projects subject to the approval of CDB.
- (e) Provide support to the Project Manager and/or Procurement Specialist in the conduct of the procurement functions of the IA.
- (f) Supervise the implementation of maintenance sub-projects, including certification of expenditure and preparation of status reports in accordance with procedures as outlined for the implementation of such sub-projects.
- (g) Expedite progress payment vouchers prepared by technical consultants to facilitate applications for disbursement to CDB for sub-project activities accomplished.
- (h) Arrange for the hand-over of each completed sub-project to sponsoring agencies along with the sub-project final reports and as-built drawings prepared by the technical consultants.
- (i) Coordinate with the technical consultants, the preparation of sub-projects' maintenance plan for incorporation into the sponsoring agency's maintenance programme.
- (j) Attend community meetings organised by the Community Liaison Officer and prepare appropriate technical briefs as required.

- (k) Assist technical consultants with the estimation of communities' overall in-kind contribution to sub-projects including cost of voluntary contributions made all members of the community.
- (l) Attend OE meetings, to provide information on proposed sub-project profiles and to report on activities.

3. QUALIFICATIONS

3.01 The Engineer shall have a Master's Degree in Civil/Structural/Building Engineering and a minimum of 3 years or a Bachelor of Science degree in Civil/Structural/Building Engineering and a minimum of 8 years relevant experience in the preparation, appraisal and supervision of projects in transportation engineering, structural engineering and geotechnical engineering. Specific experience in the Caribbean and working in a donor agency or an international financial institution will be an asset.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis:

- (a) the volume of projects (number and value) planned and achieved;
- (b) the mix of sub-projects (sectors, beneficiaries) planned and achieved;
- (c) funding partnerships formed (numbers, value); and
- (d) partner and beneficiary feedback.

DRAFT TERMS OF REFERENCE MONITORING AND EVALUATION OFFICER

1. JOB SUMMARY

1.01 The Monitoring and Evaluation (M&E) Officer, BNTF IA will report to the Project Manager (PM), and is responsible for analysing, interpreting and presenting M&E results, evaluating project performance and impact. Depending on the size of the project portfolio in the country this may be a part-time role.

2. DUTIES

2.01 The duties of the M&E Officer are:

- (a) Aligning the BNTF IA's work programme with the country's poverty reduction goals and Applying the monitoring and evaluation sections of the Guidance Framework throughout all tasks and processes, including liaising with the CDB through the PM.
- (b) Monitoring BNTF projects in the country to an agreed standard format capturing implementation and operational dimensions which are reported by the project sponsor using standard software at agreed time intervals.
- (c) Assisting the relevant government departments to monitor the post-implementation activities, in partnership with sponsoring agencies, and assist in the evaluation of social and economic impact of sub-projects on all members of the communities, using participatory approaches.
- (d) Assisting the PM with the preparation of all non-financial reports as per Schedule on a timely and regular basis, detailing all past and planned activities.
- (e) Conducting mid-term and completion evaluations of a sample of projects in the country, again using the standard methods and formats detailed in the Guidance Framework and focusing on outputs, outcomes, and impacts.
- (f) Extracting lessons learnt from in-depth evaluations for application in-country and communicating throughout the BNTF network.
- (g) Contributing to the preparation of annual reports as requested.

3. QUALIFICATIONS

3.01 The M&E Officer will hold formal qualifications in M&E to Bachelor's Degree level, with 5-7 years of experience is required working in a donor agency or an international financial institution in monitoring and evaluation techniques using log-frames.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis. They should reflect the above tasks and include:

- (a) the number of monitoring exercises completed during the year;
- (b) the number of mid-term and final project evaluations completed during the year;
- (c) the remedial measures identified, recommended and applied during the year;
- (d) funding partnerships formed (numbers, amount); and
- (e) Government, partner and beneficiary feedback.

DRAFT TERMS OF REFERENCE
ADMINISTRATIVE/ACCOUNTING OFFICER

1. JOB SUMMARY

1.01 The Administrative/Accounting Officer (AO) is responsible to the Project Manager (PM) for the operation of the financial and administrative systems, preparation of budgetary and financial reports, financial statements, the annual budget, withdrawals and disbursement requests and preparation of inputs for the financial and performance audits.

2. DUTIES

2.01 The duties of the AO are:

- (a) Formulation and Operation of Systems: Develop financial procedures (which conform to general accounting standards and principles) and administrative procedures which will serve as a guide for staff. Ensure that procedures are adhered to for the maintenance of internal control and quality management of BNTF funds.
- (b) Annual Budget: Prepare and submit the annual operational budget to the Project Manager/Coordinator (PM) for presentation to the OE.
- (c) Reports and Statements: Prepare and submit as required, budgetary and accurate financial reports and statements, generated from data systems, to the PM and or other funding institutions for information purposes and use in the decision-making process.
- (d) Operational: Prepare and submit withdrawal and disbursement requests to CDB in accordance with the Disbursement Guidelines for CDB Financed Projects and Disbursement letters. Allocate, monitor and control expenditures for the IA. Manage the payroll and relevant worksheets. Monitor project accounts and prepare payments to suppliers, contractors, trainees and training agents.
- (e) Audits: Supervise the conduct of financial and performance audits by external auditors.
- (f) BNTF module of CDB's CRM platform: Supervise and maintain the financial records on the BNTF module utilising sound financial and database management procedures in accordance with the Operations Manual.

3. QUALIFICATIONS

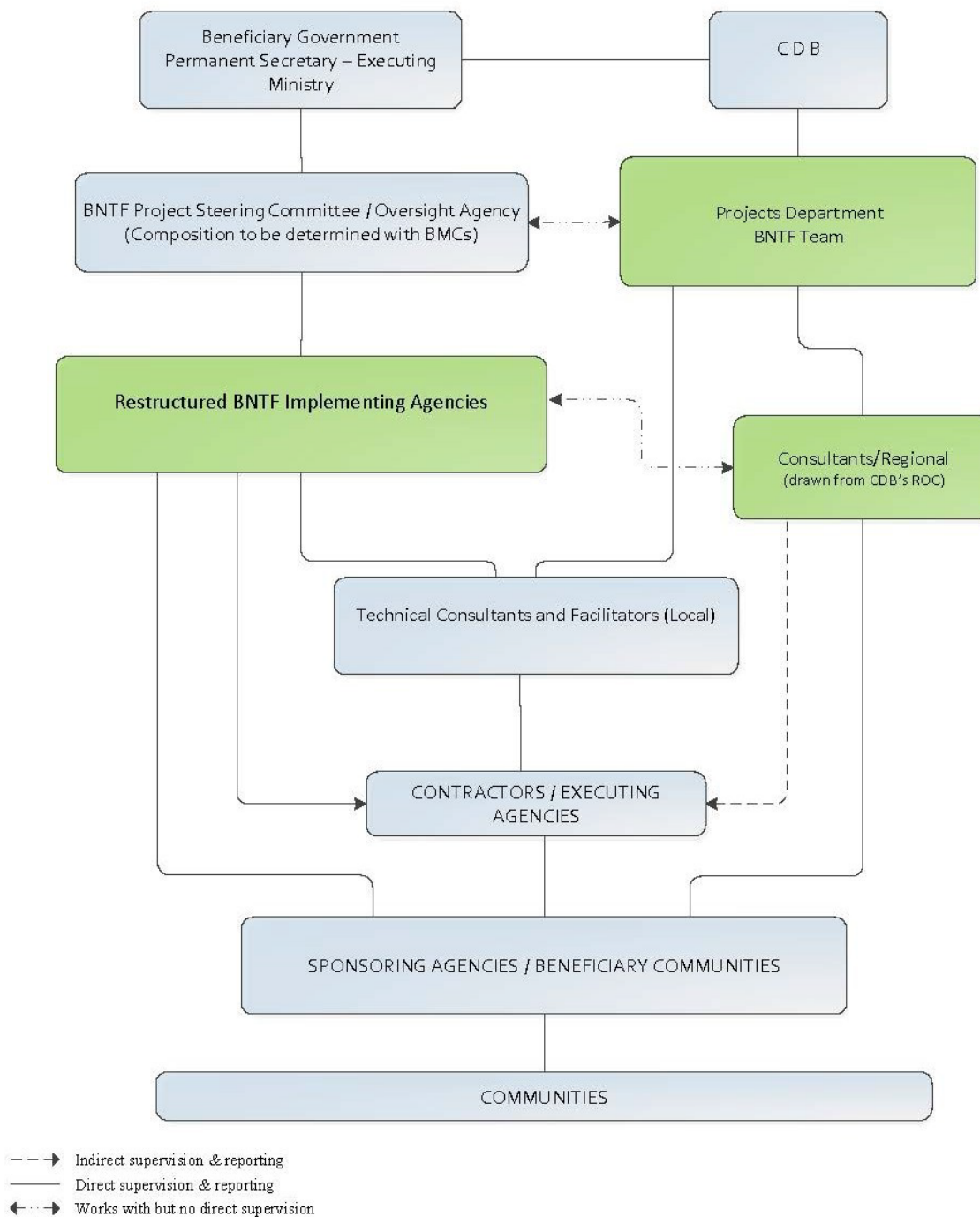
3.01 The AO is expected to have a Bachelor's Degree in Accounting or related field or mid-level accounting professional qualification (e.g. Level 2 ACCA, Level 3 CGA). A minimum of three years' experience in accounting is required, in addition to proficiency in computer skills, including use of spreadsheets, database management and word processing. Good written and oral communications skills are required. Prior project-related experience would be an asset.

4. PERFORMANCE INDICATORS

4.01 Performance in this role will be measured against the following and specific targets will be formulated on an annual basis: They should reflect the above tasks and include:

- (a) accuracy in matching funds available to utilisation rates, as measured by ex-ante forecasts and ex-post actual data on funds required and utilised;
- (b) standardised record keeping;
- (c) producing timely accounts; and
- (d) achieving unqualified audit reports and compliance checks.

BNTF ORGANISATIONAL CHART



DRAFT TERMS OF REFERENCE
NATIONAL COMMUNICATION AND KNOWLEDGE MANAGEMENT CONSULTANT
[INSERT COUNTRY NAME]

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF) Programme is the main vehicle of the Caribbean Development Bank (CDB) for pursuing poverty reduction in the region, through the provision of basic infrastructure and skills training towards improving the livelihoods of beneficiaries in Participating Countries (PCs). BNTF has implemented approximately 3,000 sub-projects over the past 45 years, directly impacting the lives of more than three million beneficiaries in poor communities. Projects are implemented through grant financing from the Bank's Special Development Fund [Unified] [SDF (U)] and Government counterpart contributions. Under the eleventh phase (BNTF 11), the Participating Countries (PCs) are Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname.

1.02 One Programme outcome seeks to increase visibility and knowledge of its interventions across the nine PCs. The related output focuses on the preparation of knowledge products, highlighting the activities carried out during the implementation of BNTF 11. To achieve these desirables, CDB will engage a Communications and Knowledge Management (CKM) Consultant to assist with the implementation of the BNTF's overarching Regional Knowledge Management and Communications (KMC) strategy and national Knowledge Management and Communications strategy to promote the work of BNTF 11 while leveraging private sector interests. The consultant will also be required to outline suggested methods for increasing overall awareness of the Programme at the community, national and regional levels. In addition, CDB proposes to link the existing multimedia platforms managed by Implementing Agencies (IAs) in the respective PCs which promote the work of the Programme, to CDB's website.

2. OBJECTIVE

2.01 The Communications and Knowledge Management Consultant (CKMC) will assist the Implementing Agency to successfully implement the national and regional KMC's. The CKMC will oversee and lead (as needed) the visibility activities and stakeholder collaboration and communications to ensure greater collaboration and partnerships.

3. SCOPE OF SERVICES

3.01 The scope of services for the CKM Consultant will include, but not be limited to the following:

- (a) Implement the national KMC Strategy and Work Plan, including all communications efforts related to the BNTF 11 project, traditional, and digital media strategies.
- (b) Ensure that approaches and plans support the targeted delivery of the KMC Strategy, in consultation with BNTF's National Implementing entity
- (c) Ensure consistency in messaging and visibility across various communications channels.
- (d) Conduct meetings to share the Draft CKM Strategy with the CDB's, BNTF Team, PCs, IAs and select partners.

- (e) Coordinate the production of visibility items such as best practice videos, brochures, electronic newsletters, websites, technical guides, newsletters, booklets, brochures, posters, and presentations) infographics etc.
- (f) Review and where necessary, develop stakeholder listing to ensure that priority stakeholders are kept informed of the BNTF 11 project implementation. This includes liaising with media to ensure media coverage and exposure.

4. IMPLEMENTATION ARRANGEMENTS

4.01 The head of the Country Implementing Agency or his/her designate will have overall responsibility for coordinating the administrative and logistic arrangements for the consultancy and facilitating the work of the Consultant as well as facilitating the implementation of the assignment. He or she will introduce the Consultant to the staff, IAs, and key BNTF stakeholders and assist with any operational issue(s) which may arise. The Consultant will also be provided with technical support that may be required to complete the activities outlined in the agreed Work Plan related to the Scope of Services at Section 3 of this Terms of Reference (TOR).

4.02 Remote systems such as Microsoft Teams, GoToMeeting and WhatsApp, will be used by CDB to communicate with the Consultant during the implementation of the assignment.

5. QUALIFICATIONS AND EXPERIENCE

5.01 The Consultant must have a university degree in communications and at least five years' practical experience in designing and implementing communication and knowledge management projects. Experience working with poverty reduction donor-funded projects will be an asset. Knowledge of and familiarity with preparing educational and knowledge management products and promotional materials for community-level projects in the Caribbean region will be considered an asset. Experience reporting on qualitative and quantitative analytics is required.

5.02 Fluency in English, computer literacy with a good knowledge of Microsoft Office applications, excellent analytical skills, and the ability to communicate or relate well to persons at technical and non-technical levels are also required. Knowledge of online collaborative tools and technologies is required.

6. REPORTING REQUIREMENTS

6.01 The Consultant will be required to provide the BNTF IA with the following reports and other deliverables:

- (a) **Inception Report:** (maximum four pages) which includes the Work Programme for the organisation and delivery of the activities to be carried out under the Scope of Services of the TOR, which is to be provided within seven days after commencement of the assignment.
- (b) **Bi-monthly reports:** outlining activities undertaken, impact, best practices and overall results.
- (c) **End of Consultancy Report:** To be submitted 14 days after the completion of the final training session.

6.02 One hard copy of the Report and one in electronic format should be submitted to CDB for review and comments.

6.03 The electronic copies of the documents outlined above at (a) to (g) should be submitted to CDB in Microsoft Word, Adobe PDF, PowerPoint and Excel formats, where applicable and photographs, videos and other data in readily accessible formats.

7. DURATION

7.01 The duration of the Consultancy is 60 working days over a period of six months.

DRAFT TERMS OF REFERENCE
REGIONAL COMMUNICATION AND KNOWLEDGE MANAGEMENT CONSULTANCY

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF) Programme is the main vehicle of the Caribbean Development Bank (CDB) for pursuing poverty reduction in the region, through the provision of basic infrastructure and skills training towards improving the livelihoods of beneficiaries in Participating Countries (PCs). BNTF has implemented approximately 3,000 sub-projects over the past 45 years, directly impacting the lives of more than three million beneficiaries in poor communities. Projects are implemented through grant financing from the Bank's Special Development Fund [Unified] [SDF (U)] and Government counterpart contributions. Under the eleventh phase (BNTF 11), the Participating Countries (PCs) are Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname.

1.02 One Programme outcome seeks to increase visibility and knowledge of its interventions across the nine PCs. The related output focuses on the preparation of knowledge products, highlighting the activities carried out during the implementation of BNTF 11. To achieve these desirables, CDB will engage a Communications and Knowledge Management Consultant (CKMC) to assist with the implementation of the BNTF's overarching Regional Knowledge Management and Communications (KMC) strategy as well as monitor the implementation of the nine national KMC strategies with the support of CDB's Department of Communications and Corporate Affairs (DCCA).

2. OBJECTIVE

2.01 The CKMC will work with the BNTF Staff at CDB as well as the nine Implementing Agency to successfully implement the national and regional KMC's. The CKMC will oversee and lead (as needed) the visibility activities and stakeholder collaboration and communications to ensure greater collaboration and partnerships.

2.02 The overall objective of this assignment is to implement the communications and knowledge management roadmap developed under BNTF 10 at the regional and country levels and also incorporate the latest development trends and knowledge management best practices into BNTF's work.

3. SCOPE OF SERVICES

3.01 The scope of services for the CCKM Consultant will include, but not be limited to the following:

- (a) Implement the regional KMC Strategy and Work Plan and supervise and monitor the national KMC Strategies and Work Plans, including all communications efforts related to the BNTF 11 project, traditional, and digital media strategies.
- (b) Ensure that approaches and plans support the targeted delivery of the KMC Strategy, in consultation with BNTF's National Implementing entity.
- (c) Ensure consistency in messaging and visibility across various communications channels.
- (d) Conduct meetings to build stakeholder engagement around the share the regional and national KMC Strategies with the CDB's, BNTF Team, PCs, IAs and select partners.

- (e) Coordinate the production of visibility items such as best practice videos, brochures, electronic newsletters, websites, technical guides, newsletters, booklets, brochures, posters, and infographics.
- (f) Review and where necessary, develop stakeholder listing to ensure that priority stakeholders are kept informed of the BNTF 11 project implementation. This includes liaising with media to ensure media coverage and exposure.

4. IMPLEMENTATION ARRANGEMENTS

4.01 CDB's Community Development Specialist (CDS) or his/her designate will have overall responsibility for coordinating the administrative and logistic arrangements for the consultancy and facilitate the work of the Consultant. CDB will facilitating the implementation of the assignment. and will introduce the Consultant to the staff at CDB's Headquarters, IAs, and key BNTF stakeholders and also assist with any operational issue(s) which may arise. The Consultant will also be provided with technical support that may be required to complete the activities outlined in the agreed Work Plan that is related to the Scope of Services at Section 3 of this Terms of Reference (TOR).

4.02 Remote systems such as Microsoft Teams, Skype, GoToMeeting and WhatsApp, will be used by CDB to communicate with the Consultant during the implementation of the assignment.

5. QUALIFICATIONS AND EXPERIENCE

5.01 The Consultant must have a university degree in communications and at least five years' practical experience in the design and implementation of communication and knowledge management projects. Experience working with poverty reduction donor-funded projects will be an asset. Knowledge of and familiarity with the preparation of educational and knowledge management products and promotional materials for community-level projects in the Caribbean region will be considered an asset. Experience reporting on qualitative and quantitative analytics is required.

5.02 Fluency in English, computer literacy with a good knowledge of Microsoft Office applications, excellent analytical skills, and the ability to communicate or relate well to persons at technical and non-technical levels are also required. Knowledge of online collaborative tools and technologies is required.

6. REPORTING REQUIREMENTS

6.01 The Consultant will be required to provide the BNTF with the following reports and other deliverables:

- (a) **Inception Report:** (maximum four pages) which include the Work Programme for the organisation and delivery of the activities to be carried out under the Scope of Services of the TOR which is to be provided within seven days after commencement of the assignment.
- (b) **Monthly reports** outlining activities undertaken, impact, best practices and overall results.
- (c) **End of Consultancy Report:** To be submitted 14 days after the completion of the work plan.

6.02 One hard copy of the Report and one in electronic format should be submitted to CDB for review and comments.

6.03 The electronic copies of the documents outlined above at (a) to (g) should be submitted to CDB in Microsoft Word, Adobe PDF, PowerPoint and Excel formats where applicable and photographs, videos and other data in easily accessible formats.

7. DURATION

7.01 The duration of the Consultancy is for two years.

DRAFT TERMS OF REFERENCE
PARTNERSHIP DEVELOPMENT CONSULTANCY (NATIONAL)
[INSERT COUNTRY NAME]

1. BACKGROUND

1.01 The Caribbean Development Bank (CDB), through its Basic Needs Trust Fund (BNTF), is implementing a Partnership Strategy to mobilise resources, strengthen programme visibility, and institutionalise stakeholder engagement across its Participating Countries (PCs). Recognising that Implementing Agencies (IAs) may require targeted technical support to develop, manage, or scale partnerships, BNTF is recruiting a Partnership Development Consultant on a needs-basis.

1.02 This consultancy seeks to bolster IA capacity in engaging with corporate partners, donors, NGOs, and academic institutions to co-create impactful, inclusive, and sustainable development initiatives aligned with national and regional priorities.

2. OBJECTIVES OF THE ASSIGNMENT

2.01 The overall objective is to provide technical assistance to the [Insert Country Name] IA in the development and management of strategic partnerships under the BNTF Programme.

- (a) Strengthening the IA's capacity to identify, design, and implement multi-stakeholder partnerships.
- (b) Supporting the alignment of partnership activities with the BNTF Partnership Strategy and national development goals.
- (c) Enhancing the visibility, innovation, and sustainability of IA-led projects through strategic collaboration.

3. SCOPE OF WORK

3.01 Under the supervision of the IA Project Manager and in coordination with the BNTF Partnership Focal Point, the Consultant will:

- (a) Preparation of a detailed map of targeted partners (private sector, CSOs, etc.) based on thematic alignment with the Country Policy Framework (CPF).
- (b) Support the design of partnership concept notes, MOUs, contribution agreements, or technical assistance frameworks.
- (c) Facilitate at least three stakeholder engagement sessions or matchmaking forums.
- (d) Assist in integrating MEL indicators and sustainability mechanisms into partnership arrangements
- (e) Prepare a final report with lessons learned, tools developed, and a roadmap for ongoing partnership engagement

4. DELIVERABLES AND TIMELINE

Deliverable	Description	Due Date
Inception Report	Workplan, stakeholder mapping plan, timeline	Week 1
Partnership Assessment	IA readiness assessment and gap analysis	Week 2-4
Draft Concept Notes / MOUs	Templates and drafts for 2–3 potential partnerships	Week 5
Stakeholder Engagement Report	Summary of engagement sessions and outcomes	Week 10
Final Report	Lessons learned, tools developed, and roadmap	Week 16–18

4.01 Total estimated level of effort: 30–40 working days over a 16–18 week period.

5. REQUIRED QUALIFICATIONS

- (a) A Master’s degree in Development Studies, International Relations, Public Policy, Business Administration, or related field.
- (b) At least 7 years of professional experience in partnership development, donor engagement, or programme design.
- (c) Proven experience working with multi-stakeholder platforms including government, private sector, and civil society.
- (d) Familiarity with the Caribbean development context and CDB/BNTF mandates is an asset.
- (e) Strong analytical, facilitation, and writing skills.

6. REPORTING AND COORDINATION

6.01 The Consultant will report to the BNTF IA Project Manager with technical oversight from the BNTF Partnership Focal Point at CDB. Periodic check-ins and coordination with other consultants or MEL staff may be required.

7. LOCATION AND TRAVEL

7.01 This is a hybrid consultancy. The Consultant is expected to work remotely with limited in-country presence for stakeholder meetings, subject to prevailing health and travel guidelines

BNTF 11 PROGRAMME REPORTING SCHEDULE

Report	From	Frequency	Submission
Country Policy Framework (CPF)	PM	Once	August 31, 2025.
Sector Portfolio of sub-projects	PM	Periodic as prioritised in CPF	Ongoing
Sub-project Monitoring Reports (SPMR)	PM	Periodic as outlined in Results Matrix	Within 21 days of milestone events
Minutes of OE meetings	PM	Quarterly	Within 14 days after the end of each quarter
Status of Country Project	PM	Quarterly	Within 14 days after the end of each quarter
Procurement Plan	PM	At least annually for the following calendar year	November 30, of each year
Annual Work Plan and Budget (AWPB)	PM	Annually for the following calendar year	November 30 of each year
Quarterly Report (QR)	PM	Quarterly for the previous quarter.	Within 15 days of the end of the previous quarter.
Sub-project Completion Report (SPCR)	PM	After completion of each sub-project	Within 30 days after the completion of each subproject.
Financial Audit	Independent Auditors	Annually for calendar	Within 120 days of the end of each fiscal year.
Performance Audit	Independent Auditors	Biennially	Within 240 days of the end of June, 2026 and July 2028
Environmental and Social Performance (ESPR) Report	PM	Twice	August 31, 2027, and August 31, 2028.
Mid-Term Evaluation (MTE)	Independent Consultants	Once	By July 7, 2027
Country Project Completion Report (CPCR)	PM	Once	Within 3 months of the completion of all sub-projects.
Programme Closing Report	Independent Consultants	Once	Within 6 months after CDB's TDD

Note: Report formats to be agreed with CDB. PM - Project Manager / Coordinator OE - Oversight Entity

BNTF 11 SAMPLE OUTCOMES AND OUTPUTS

SECTOR/ PROGRAMME AREA	OUTCOMES	OUTPUTS – SDF & BNTF INDICATORS
EDUCATION	Improved access to quality education and HRD services	Classrooms and educational support facilities built or upgraded according to minimum standards (number), of which ECD/Primary/Secondary
		Beneficiaries of skills training activities (number female by age)
		Beneficiaries of skills training activities (number male by age)
		Students benefitting from improved physical classrooms conditions or enhanced teacher competence, or school infrastructure (number female)
		Students benefitting from improved physical classrooms conditions or enhanced teacher competence, or school infrastructure (number male)
		Teachers and Principals Trained/Certified (number female by age) ECD/Primary/Secondary
		Teachers and Principals Trained/Certified (number male by age) ECD/Primary/ Secondary
LIVELIHOODS	Livelihoods and employment opportunities enhanced	Business plans approved (number)
		Value of assets transferred (\$)
		Change in income (%) (male by age) Change in income (%) (female by age)
WATER AND SANITATION	Improved access to quality water supply and sanitation services	Households with access to water supply (number by head of household)
		Installed water capacity (m3)
		Water supply lines installed or upgraded (km)
TRANSPORT AND STORAGE	Improved access to basic services	Secondary and other roads built or upgraded (km)
		Beneficiaries of community infrastructure (number female by age)
		Beneficiaries of community infrastructure (number male by age)
		Beneficiaries of road projects (number female by age)
		Beneficiaries of road projects (number male by age)
		Community infrastructure built/upgraded (number)
YOUTH AND CITIZEN SECURITY	Citizen enhanced security Sustainable youth employment increased	Crime and violence prevention activities funded (number)
		Youth gainfully employed (number) (m/f by age)
		Youth micro-enterprises and other initiatives funded and registered (number) (m/f by age)
		Youth trained in business and technical skills (number) (m/f by age)
ENERGY GENERATION AND SUPPLY	Enhanced use of renewable energy technology	Conventional or renewable power generation capacity installed (MW) of which renewable (MW)
		Energy savings as a result of EE/RE interventions (GWh)

DRAFT TERMS OF REFERENCE
STRATEGIC PARTNERSHIP ENGAGEMENT CONSULTANT (REGIONAL)

1. BACKGROUND

1.01 The Basic Needs Trust Fund Programme (BNTF) remains the flagship community-based poverty reduction initiative of the Caribbean Development Bank (CDB), having impacted over three million beneficiaries across its Participating Countries (PCs) over four decades. In its eleventh cycle (BNTF 11), the Programme is broadening its scope beyond grant-making to integrate strategic partnerships that enable greater reach, innovation, and sustainability.

1.02 The implementation of the BNTF 2025–2030 Partnership Strategy reflects a shift from transactional relationships to structured, goal-aligned partnerships with the private sector, civil society, and development agencies. This new approach demands improved capacity within Implementing Agencies (IAs) to cultivate, formalise, and manage high-value partnerships, while also building systems for sustained partner engagement and tracking.

1.03 To support this effort, CDB will engage a Strategic Engagement Consultant to work with BNTF IAs and the Core Team to develop key partnership competencies, facilitate regional and international partnership opportunities, and ensure the sustainability of BNTF’s partnership framework.

2. OBJECTIVE

2.01 To build capacity within BNTF’s Core Team and IAs to operationalise the Partnership Strategy 2025–2030, while facilitating high-value partnerships that enhance resource mobilisation, community resilience, and inclusive development.

3. SCOPE OF SERVICES

3.01 The Consultant will:

- (a) Conduct capacity assessments and develop tailored partnership training for three IA tiers (Advanced, Developing, Emerging).
- (b) Create a simplified Partnership Toolkit with templates and guidance documents.
- (c) Deliver training on partnership screening, negotiation, and management.
- (d) Facilitate regional and international partner identification and structured engagements.
- (e) Provide mentoring to IA Partnership Focal Points.
- (f) Support IAs in developing at least one strategic, nationally relevant partnership.
- (g) Establish a basic system for partnership tracking, reporting, and knowledge sharing.

3.02 Specific Tasks

- (a) Participate in a project orientation with the BNTF Core Team
- (b) Assess partnership management capacity across BNTF IAs.
- (c) Develop and deliver a three-tiered training curriculum.
- (d) Facilitate five or more regional partnership dialogues and help negotiate 3–5 formal partnership agreements.
- (e) Support IAs in stakeholder mapping and partner engagement meetings.
- (f) Document early partnership successes and lessons learned.
- (g) Create simplified templates for partnership tracking and reporting.

- (h) Support the development of a sustainability plan for ongoing partnership development beyond the consultancy period.

4. REPORTING REQUIREMENTS

- (a) Submission of an Inception Report detailing the work plan and approach two weeks after contract start.
- (b) Monthly progress reports summarising key activities and capacity-building outcomes.
- (c) Mid-term report summarising capacity-building, partnership engagements, and deliverables to date.
- (d) Final report documenting all consultancy outcomes, key tools developed, and recommendations for sustaining the partnership strategy.

5. IMPLEMENTATION ARRANGEMENTS

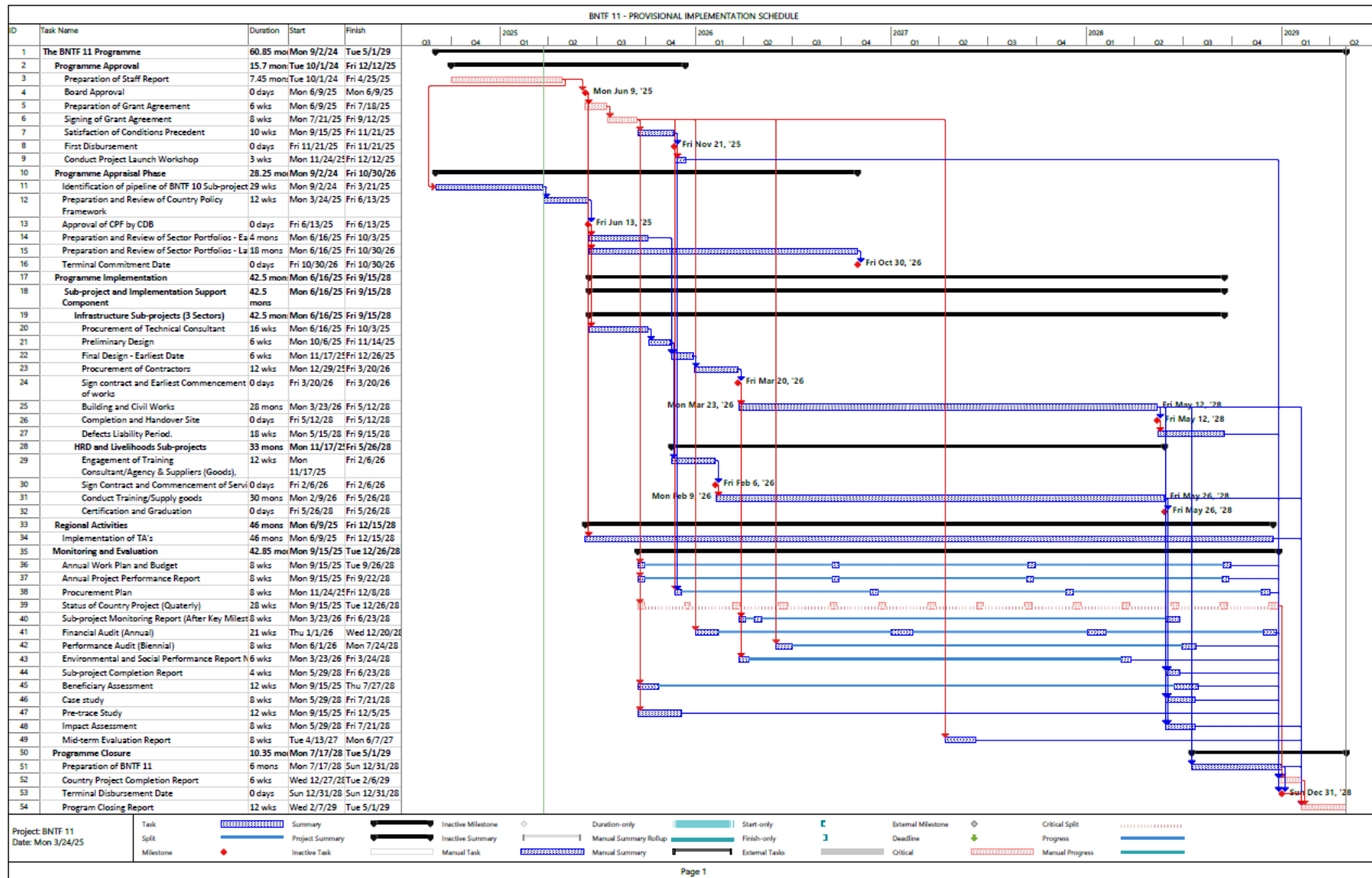
5.01 The Strategic Engagement Consultant will report to the BNTF Portfolio Manager and coordinate closely with the BNTF Core Team and IAs. Consultancy support will be delivered through a mix of in-country visits, virtual workshops, and direct technical assistance.

6. DURATION

6.01 The assignment is expected to be undertaken over an 18-month period.

7. QUALIFICATIONS AND EXPERIENCE

- (a) Advanced degree in international development, public policy, business administration, or a related field.
- (b) At least eight years of experience in partnership development, capacity building, and stakeholder engagement.
- (c) Demonstrated experience working with multilateral development institutions and civil society organisations.
- (d) Strong facilitation, negotiation, and training skills.
- (e) Excellent understanding of Caribbean development dynamics and regional integration.



PROCUREMENT PLAN TEMPLATE

All Estimated Costs Are In USD

A. General

1. Project Information

Country: BNTF Participating Countries: Barbados, Belize, Commonwealth of Dominica, Grenada, Cooperative Republic of Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname

Grantee: Government of Participating Countries

Project Name: Basic Needs Trust Fund – Eleventh Programme

Implementing Agency: BNTF Implementing and Executing Agencies (IA/EA)

2. Bank's Approval Date of the Procurement Plan Template: June 9, 2025

3. This Procurement Plan Template is valid until: December 31, 2028

4. Prior Review Thresholds: Procurement decision subject to prior review by the Bank.

Procurement Method	Prior Review Threshold	Comments
ICB – Works	Greater than or equal 300,000	For Monserrat only
	Greater than or equal 1,000,000	All PCs except for Jamaica and Monserrat
NCB – Works	Greater than or equal to 50,000	All PCs except for Jamaica
	Greater than or equal to 350,000	For Jamaica only
Limited Bidding- Works	Greater than or equal 150,000	For Jamaica only
	Greater than or equal 50,000	All PCs except for Jamaica and Monserrat.
	Greater than or equal 10,000	For Monserrat only.
DS	Greater than 30,000	
ICB – Goods and non-consulting	Greater than or equal 50,000	For Monserrat only
	Greater than or equal 100,000	All PCs except for Jamaica and Monserrat
	Greater than or equal 150,000	For Jamaica only

Procurement Method	Prior Review Threshold	Comments
NCB – Goods	Greater than or equal 10,000	For Monserrat only
	Greater than or equal 25,000	All PCs except for Jamaica and Monserrat
	Greater than or equal 150,000	For Jamaica only
Limited Bidding- Goods	N/A	For all limited bidding for goods, post review shall apply unless otherwise agreed by
DS	All procurement	All DS will be subjected to prior review.
Non-Bank Funded	No review	Procurement procedures of PCs apply.
ICS	Greater than 10,000	
CQS	Greater than 25,000	
QCBS, LCS, FBS	All contracts subject to prior review.	
DS	All contracts subject to prior review.	
NBF	No review	Procurement procedures of PCs apply.

5. **Reference to relevant Procurement Guidelines**

- Procurement Policy for Projects Financed by CDB (November 2019)
- Procurement Procedures for Projects Financed by CDB (January 2021)

6. **Any Other Special Procurement Arrangements**

- Nil

7. **Procurement Waivers**

- Nil

B. Goods Works and Non-Consulting Services

Ref No.	Contract (Description)	Estimated Cost ('000)	Procurement/ Selection Method	Prequalification (Yes/No)	Review by Bank (Prior/Post)	Expected Bid-Opening Date	Comments
1	Various Works packages	≤100 >100 ≥1,000	LB NCB ICB ¹	May be utilised by PCs for higher value, more complex works	In accordance with point 4 above.		All PCs except Jamaica and Monserrat. For Dominica work packages
2	Various Goods Packages	≤25 25-100 >100	LB NCB ICB	procurement or where there are a significant number of potential contractors, but unlikely to be used in many instances.			≥750,000 ICB will apply.
3	Various Works packages	≤150 >150	LB NCB				For Jamaica Only.
4	Various Goods Packages	≤50 50-150 >150	LB NCB ICB				
5	Various Works packages	≤50 50-300 >300	LB NCB ICB				For Monserrat Only
6	Various Goods Packages	≤10 1050 >50	LB NCB ICB				

C. Consulting Services

Ref No.	Assignment (Description)	Estimated Cost ('000)	Selection Method	Review by Bank (Prior/ Post)	Expected Proposal Submission Date	Comments
1	Various assignments for Consultancy firms	<50 ≥50	CQS/ LCS/ FBS QCBS/ LCS/ FBS/QBS	In accordance with point 4 above.		Selection method would be subject to CDB's No Objection unless otherwise agreed in writing.

D. Procurement Capacity Building activities for the Implementing/Executing Agency

1. Project Launch Workshop: Completed in Q3, 2025.
2. The provision of online procurement e-learning by the CDB.

Goods, Works and Non-Consultancy Services

- NCB - National Competitive Bidding
- ICB - International Competitive Bidding

¹ Greater than 750 for Dominica

- RCB - Regional Competitive Bidding
- LB - Limited Bidding
- DS - Direct Selection
- FA - Force Account
- CP - Commercial Practices
- APA - Alternative Procurement Arrangements
- NBF - Non-Bank Financed
- Other

Consultancy Services:

- QCBS - Quality and Cost-Based Selection
- QBS - Quality-Based Selection
- FBS - Fixed Budget Selection
- LCS - Least-Cost Selection
- CQS - Consultants' Qualification Selection
- DS - Direct Selection
- CP - Commercial Practices
- APA - Alternative Procurement Arrangements
- ICS - Individual Consultants Selection
- NBF - Non-Bank Financed

Other (as above)

DRAFT TERMS OF REFERENCE
PROCUREMENT SPECIALIST

1. BACKGROUND

1.01 The Basic Needs Trust Fund (BNTF) Programme is a grant-funded initiative of the Caribbean Development Bank (CDB) which started over 45 years ago and is now in Tenth phase. BNTF is the Bank's key instrument for addressing poverty reduction by providing access to basic public services through the provision of social and economic infrastructure and the development of skills to enhance employability, community management and engagement. The Eleventh BNTF Programme (BNTF 11) will continue to assist poor and vulnerable communities in nine BNTF Participating Countries (PCs), viz., Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, and St. Vincent and the Grenadines and Suriname. The BNTF Programme also includes a Regional Coordination component which is managed by CDB and supports programme implementation and management, and monitoring and evaluation (M&E).

1.02 Each PCs has established an Implementing Agency (IA), which reports to an executing ministry, and is responsible for the administration of sub-projects in the respective country. Sub-projects are implemented under tripartite agreements between the beneficiary community, the responsible public or civil society entity and the IA. Sub-projects are approved by an Oversight Entity (OE) while the IA manages a portfolio of sub-projects as part of the Country Project. The core IA staff includes a Project Manager (PM), a Project Engineer (PE), a Community Liaison Officer (CLO), a Monitoring and Evaluation Officer, and an Administrative/Accounting Officer (AO).

1.03 A Procurement Specialist is needed to assist the IA with the various procurement activities envisaged under the Project.

2. OBJECTIVE

2.01 The objective of the assignment is to assist the IA and Co-implementation agencies with the various procurement activities envisaged under the Project.

3. SCOPE OF SERVICES

3.01 The Procurement Specialist will be responsible for assisting the IA and Co-implementation Staff in activities related to procurement of goods, works and consultancy services to be implemented according to CDB Procurement Guidelines. In particular, the Procurement Specialist will assist the IA and Co-implementation Staff carrying out the tasks detailed below, and other tasks as necessary:

- (a) provide assistance to IA and Co-implementation staff, through capacity-building activities; in drafting terms of reference, defining technical specifications, negotiating contracts as needed;
- (b) examine relevant documents and develop technical specifications for goods and works;
- (c) review/prepare requests for proposals, bidding documents and evaluation reports for goods, works and consultancy services for design and construction supervision;
- (d) assist/preparation in the preparation of comprehensive evaluation reports according to the standards of CDB for timely transmission to CDB for review and no objections;
- (e) finalising Terms of Reference for consultant services;
- (f) training of bid evaluation committees;
- (g) provide guidance on the execution of the evaluation process, including, inter alia:
- (h) organisation of the evaluation process, including preparation/finalisation of evaluation reports;

- (i) responsibilities of the evaluation committee, individually and as a group;
- (j) research market for potential bidders;
- (k) assist with procurement plan revisions;
- (l) assist the IA and Co-Implementation Staff with the negotiations for works and goods contracts; and
- (m) review/prepare contracts for works and goods, and consultancy services including Memorandum of Understanding.

4. DELIVERABLES AND REPORTING REQUIREMENTS

4.01 Based on 'Scope of Services at paragraph 3 above, the consultant will submit the following:

- (a) A work plan with detailed activities and timeline of respective procurement services will be prepared in consultation with the PC within five working days after the contract is signed; and
- (b) Progress reports based on the work plan agreed with CDB and the IA. The progress reports will contain, but not limited to, the list of activities planned for the reporting period, their progress toward the target, results of the activities.

5. DURATION OF ASSIGNMENT

5.01 The consultancy will require a maximum of 120 person days conducted over a period of 48 months from the date of contract signing.

6. QUALIFICATIONS AND EXPERIENCE

6.01 The consultant should possess the following minimum qualifications:

- (a) Preferably, a recognised accredited procurement qualification eg Chartered Institute of Procurement and Supply and/or a Bachelor's degree in procurement or related areas;
- (b) at least eight (8) years' work experience in procurement of goods and services, particularly in civil works;
- (c) knowledge on national rules and legislations in the field of procurement and civil construction/engineering;
- (d) knowledge and/or experience in CDB procurement policies and procedures, or other standards set forth for a procurement is an advantage;
- (e) strong communication and reporting skills and ability to work in a team; and
- (f) strong spoken and written communication skills and fluency in the English language

DRAFT TERMS OF REFERENCE
MONITORING AND EVALUATION SPECIALIST

1. BACKGROUND

1.01 The Projects Department is primarily responsible for the efficient and cost effective identification, preparation, appraisal and supervision of CDB's portfolio of public, private sector and technical assistance projects consistent with the Bank's policies, procedures and conditions. The BNTF Unit is within the Social Sector Division of the Projects Department.

1.02 The Basic Needs Trust Fund (BNTF) Programme is the main vehicle of the Caribbean Development Bank (CDB) for pursuing poverty reduction in the region, through the provision of basic infrastructure and skills training towards improving the livelihoods of beneficiaries in Participating Countries (PCs). BNTF has implemented approximately 3,000 sub-projects over the past 45 years, directly impacting the lives of more than three million beneficiaries in poor communities. Projects are implemented through grant financing from the Bank's Special Development Fund [Unified] [SDF (U)] and Government counterpart contributions. Under the eleventh phase (BNTF 11), the Participating Countries (PCs) are Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, and Suriname.

2. OBJECTIVES

2.01 Reporting to the Portfolio Manager (PM), BNTF, the objectives of the M&E Specialist will be to:

- (a) Guide the design and implementation of appropriate M&E and reporting systems for the BNTF programme and for BNTF ten projects and associated sub-projects.
- (b) Analyse, interpret and present M&E results.
- (c) Coordinate the delivery of the M&E objectives of the BNTF and approved sub-projects.
- (d) Monitor BNTF progress, identifying problems and recommending strategies to address them.

3. KEY RESPONSIBILITIES

3.01 The M&E Specialist will:

- (a) Develop the overall strategy for BNTF M&E, including but not limited to project reviews, participatory impact assessments, process monitoring, operations monitoring and reporting, and workshops to share lessons learned.
- (b) In collaboration with the PM and the BNTF Unit team, review the BNTF results and performance measurement framework, revising it as appropriate with respect to outputs, outcomes, related targets, indicators and monitoring mechanisms to be pursued in the development of the Project Implementation Plan.
- (c) Guide the process for identifying key performance indicators; design and facilitate the establishment of demonstration sub-project M&E systems that relate appropriately to the BNTF, developing results-oriented logical frameworks.

- (d) Record and report progress against the annual Work Programme and Budget, and results-based framework; and lead the process for designing/updating the format of progress and performance reports.
- (e) Review progress performance reports, analysing them for outcome achievement and to identify the causes of potential bottlenecks in project implementation.
- (f) Supervise BNTF and sub-project monitoring arrangements to ensure compliance with the BNTF Grant Agreements.
- (g) Guide the preparation of the project reports and sub-project related results-based reporting and review for quality control. Prepare reports for submission to the BNTF team and Management as required.
- (h) Review the quality and availability of existing social, economic and poverty data, methods of collection and the degree to which it will provide good baseline statistics for outcome monitoring, reporting and impact evaluation
- (i) Coordinate the collection of existing and/or new data, as necessary, to give effect to agreed M&E systems for the BNTF Programme as well as for approved sub-projects.
- (j) Develop a plan for project-related capacity building on M&E and organise training with stakeholders in participatory M&E skills.
- (k) Work closely with the Knowledge Management and Communications Consultant and implementing partners, prepare reports on M&E findings and disseminate as part of BNTF knowledge products.
- (l) Draft terms of reference for evaluations, surveys or special studies of the BNTF and approved sub-projects as well as procure, guide and supervise Consultant(s) as required.

4. COMPETENCIES

4.01 The successful candidate should have the following competencies:

- (a) Diplomacy and conflict resolution skills as well as the capacity to work both as part of a team or individually.
- (b) Sound analytical, innovative and strategic thinking skills.
- (c) Excellent oral and written communication skills in English and be able to meet deadlines while working collaboratively in a team environment. Candidates must be able to work in a fast-paced and time-sensitive work environment, and possess a high degree of discretion and tact in dealing with internal and external clients and stakeholders at all levels.
- (d) Proficient in the use of the Bank's standard software and Microsoft Office Suite.
- (e) Client focus, drive for continuous development and achievement of results.

5. QUALIFICATIONS

5.01 The M&E Specialist will hold formal qualifications in M&E to Master's Degree level, with 5-7 years of experience working in a donor agency or an international financial institution in monitoring and evaluation techniques.

PROGRAMME COMPONENTS BY COUNTRY AND FINANCING PLAN
(S'000)

Programme Components	Barbados		Belize		Dominica		Grenada		Guyana		Jamaica		Montserrat		St. Lucia		St. Vincent and the Grenadines		Suriname		Regional				
	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	CDB	Gov't	Total
<u>Country Projects</u>			-																						
Sub-projects	2,814	148	3,992	210	2,806	148	4,219	222	2,119	112	5,146	271	2,305	121	2,929	154	2,870	151	2,305	121	-	-	31,505	1,658	33,163
Project Management Support	210	-	214	500	189	504	227	529	356	1,191	276	645	124	289	274	1,078	396	813	124	289	-	-	2,390	5,838	8,228
Institutional Development	-	-	42	-	29	-	44	-	22	-	54	-	24	-	31		30		24		-	-	300	-	300
Project M&E	-	-	189	21	133	15	200	22	100	11	244	27	109	12	139	15	136	15	109	12	-	-	1,359	150	1,509
Implementation Support ¹	-	-	756	-	531	-	799	-	402	-	975	-	437	-	555		544		437		-	-	5,436	-	5,436
Sub-Total	3,024	148	5,193	731	3,688	667	5,489	773	2,999	1,314	6,695	943	2,999	422	3,928	1,247	3,976	979	2,999	422	-	-	40,990	7,646	48,636
Transfer Charges	1	-	1	-	1	-	1	-	1	-	1	-	1	-	1	-	1	-	1	-	-	-	10	-	10
Country Total	3,025	148	5,194	731	3,689	667	5,490	773	3,000	1,314	6,696	943	3,000	422	3,929	1,247	3,977	979	3,000	422	-	-	41,000	7,646	48,646
<u>Regional Coordination</u>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,000	-	5,000	-	5,000
Total	3,025	148	5,194	731	3,689	667	5,490	773	3,000	1,314	6,696	943	3,000	422	3,929	1,247	3,977	979	3,000	422	5,000	-	46,000	7,646	53,646

Note: Any errors due to rounding

ANNUAL LOCAL SUB-PROJECT COUNTERPART (2025-2028)

(\$'000)

Country	2025	2026	2027	2028	Total
Barbados	7	22	52	67	148
Belize	10	32	73	95	210
Commonwealth of Dominica	7	22	52	67	148
Grenada	11	33	78	100	222
Guyana	6	17	39	50	112
Jamaica	13	41	95	122	271
Montserrat	6	18	42	55	121
St. Lucia	8	23	54	69	154
St. Vincent and the Grenadines	7	23	53	68	151
Suriname	6	18	42	55	121
Total	81	249	580	748	1,658
Percentage of total for each year	5	15	35	45	100

Note: Any errors due to rounding

TERMS AND CONDITIONS OF THE GRANTS

No.	Subject	Terms and Conditions of the Grants
1.	Parties	<p><u>Bank:</u> Caribbean Development Bank (CDB).</p> <p><u>Beneficiaries:</u> Governments of Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname (the Eligible Governments).</p> <p><u>Basic Needs Trust Fund (BNTF) Participating Countries (PCs):</u> Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines and Suriname.</p> <p><u>Implementing Agencies:</u> BNTF Implementing Agency (IA) in each BNTF PC.</p>
2.	Amount of Grants	The Bank agrees to make available to each Eligible Government by way of grant, the respective amount specified in Appendix 5.1 from the Special Funds Resources (SFR) of the Bank allocated to the BNTF Eleventh (BNTF 11) Programme (the Grants).
3.	Purpose	The purpose for which the Grants are being made is to assist each Eligible Government in financing the BNTF 11 Programme in the respective BNTF PCs (the Project).
4.	Disbursement of Grants	<p>Except as the Bank may otherwise agree:</p> <p>(a) Disbursements in relation to sub-projects shall only be made in respect of sub-projects meeting the selection criteria set out in Appendix 4.1.</p> <p>(b) The Bank shall not disburse more than:</p> <ul style="list-style-type: none"> (i) Ninety-five thousand United States dollars (\$95,000) of the estimated cost of any small sub-project; (ii) Three hundred and eighty thousand United States dollars (\$380,000) of the estimated cost of any medium sub-project; (iii) Eight hundred and fifty-five thousand United States dollars (\$855,000) of the estimated cost of any large sub-project; and (iv) Eight hundred and fifty-five thousand United States dollars (\$855,000) of the estimated cost of any special sub project. <p>(c) Each Eligible Government shall comply with the Bank's "Disbursement Guidelines for CDB-Financed Projects" published in January 2019, which may be amended from time to time by the Bank.</p>

5.	Period of Disbursement	<p>The Bank shall have received an application for first disbursement of each Grant by September 30, 2025, or such later date as may be specified in writing by the Bank.</p> <p>The Grants shall be disbursed up to December 31, 2028, or such later date as may be specified in writing by the Bank.</p>
6.	Procurement	<p>(a) Procurement of goods, works and/or services to be financed from the Grant resources shall be in accordance with the following policy and procedures or such other policy or procedures as the Bank may from time to time specify in writing:</p> <p style="padding-left: 40px;">(i) <i>Procurement Policy for Projects Financed by CDB (November 2019); and</i></p> <p style="padding-left: 40px;">(ii) <i>Procurement Procedures for Projects Financed by CDB (January 2021)</i></p> <p>(b) The Procurement Plan Template (the Plan) approved by the Bank is set out at Appendix 4.24. Any revisions to this Plan shall require the Bank's prior approval in writing.</p>
7.	Additional Conditions Precedent to First Disbursement of Each Grant	<p>The Bank shall not be obliged to make the first disbursement of each Grant until each Eligible Government has, furnished or caused to be furnished to the Bank, evidence acceptable to the Bank, that the following conditions have been satisfied:</p> <p style="padding-left: 40px;">(i) the OE has been assigned the oversight responsibilities set out in Appendix 4.12 for the PC's BNTF 11 Country Projects; and</p> <p style="padding-left: 40px;">(ii) the IA has been assigned implementation responsibility for the PC's BNTF 11 Country Projects.</p>
8.	Conditions Precedent to Disbursement of Grants with respect to each Sub-Project	<p>Prior to disbursement in respect of any sub-project financed by any Grants:</p> <p style="padding-left: 40px;">(i) the Bank shall be satisfied that the sub-project has been prepared in conformity with the format set out in the OM and approved by OE;</p> <p style="padding-left: 40px;">(ii) the Bank shall have given its prior written approval in respect of that sub-project; and</p> <p style="padding-left: 40px;">(iii) the Bank shall have received evidence, in form and substance acceptable to the Bank, that the lands on which the sub-project is to be implemented are publicly owned by the Eligible Government, or on a long-term lease agreement, or that the Eligible Government has entered into such other arrangements acceptable to the Bank, in relation to the land</p>

		on which the sub-project is to be implemented.
9.	Condition Precedent to Disbursement of Grants with respect to each Sub-Project co-financed by an Eligible Partner	The IA has submitted to the Bank, a copy of a fully executed agreement made between the IA and the Eligible Partner, in form and substance satisfactory to the Bank, setting out, among other things, the Eligible Partner's obligations with respect to the provision of financing for the sub-project and the details of such assistance.
10.	Project Implementation	<p>(a) Except as the Bank may otherwise agree, each Eligible Government shall implement the Project through the IA.</p> <p>(b) Each Eligible Government shall carry out the Project at all times in accordance with the ESMP.</p>
11.	Project Management	<p>Each Eligible Government shall, during the lifetime of BNTF 11 maintain:</p> <p>(i) an OE, with the composition and functions set out in Appendix 4.12, or such other composition as may be acceptable to the Bank, to perform the functions set out in Appendix 4.12; and</p> <p>(ii) an IA staffed with a PM, CLO, PE, M&E Officer, Education Specialist and AO, with qualifications and experience acceptable to the Bank, to carry out their respective duties and responsibilities set out in Appendices 4.13, 4.14, 4.15, 4.16 and 4.17, respectively or such other composition and functions as may be acceptable to the Bank. To this end, the Eligible Government shall inform the Bank of any appointments it proposes to make for these positions.</p>
12.	Engagement of Consultants	<p>(a) Each Eligible Government shall, in accordance with the procurement procedures applicable to the Grants, select and engage consultants to provide the consultancy services (the Consulting Services) required under the BNTF 11 Programme, in accordance with the applicable TORs for the Consulting Services.</p> <p>(b) Each Eligible Government shall, within a timeframe acceptable to the Bank, implement such recommendations arising from the Consulting Services, as may be acceptable to the Bank.</p>
13.	Engagement of Contractors	Each Eligible Government shall, in accordance with the procurement procedures applicable to the Grants, select and engage contractors to provide services to support the implementation of BNTF 11, including those associated with infrastructure works, capacity building and skills

		development and for other activities as may be determined by IA and the Bank.
14.	Maintenance of Infrastructure	<p>(a) Each Eligible Government shall prepare a Maintenance Strategy and Plan in form and substance acceptable to the Bank and submitted to the Bank for its no objection.</p> <p>(b) Each Eligible Government shall keep the infrastructure, including education facilities, water sanitation systems, basic community access and drains, financed from the Grants, or cause the same to be kept, in good repair and condition and provide the financial and other resources required to adequately maintain the infrastructure financed from the Grants, in accordance with the Maintenance Strategy and Plan.</p>
15.	Acknowledgment of the Bank	Each Eligible Government shall openly acknowledge the Grants funds provided by the Bank in relation to the Project in all correspondence, advertisements, promotions, publications, speeches, press releases and other similar media associated with the Project.
16.	Beneficiary's Contribution to the Project	<p>Except as the Bank may otherwise agree, each Eligible Government shall:</p> <p>(i) contribute to the Project an amount not less than the respective amounts set out in Appendix 5.1; and</p> <p>(ii) contribute to each sub-project an amount of not less than 5% of the estimated cost of the sub-project.</p>
17.	Other Conditions	<p>(a) Except as the Bank may otherwise agree, each Eligible Government shall ensure that the staff of the IA:</p> <p>(i) by August 31, 2025, or such later date as the Bank may agree, prepare and adopt the CPF as outlined in Appendix 4.11, in form and substance acceptable to the Bank;</p> <p>(ii) by February 28, 2027, or such later date as the Bank may agree, facilitate and make all necessary arrangements in consultation with the Bank for a MTE of BNTF 11 to be conducted by independent consultants. Each Eligible Government shall ensure that the recommendations resulting from the MTE are implemented within a time frame acceptable to the Bank;</p>

		<ul style="list-style-type: none"> (iii) by December 1, 2028, or such later date as the Bank may agree, facilitate and make all necessary arrangements in consultation with the Bank for the preparation of a CPCR, which will feed into the PCR. The PCR will be completed by December 31, 2028; (iv) during the lifetime of BNTF 11, furnish to the Bank, as soon as available, but in any case not later than one hundred and twenty (120) days after the end of each fiscal year, an annual financial audit of the Project, which shall include a financial audit of the account(s), conducted by independent auditors which is acceptable to the Bank; (v) during the lifetime of BNTF 11, furnish to the Bank, as soon as available, but in any case not later than February 25, 2027 and February 25, 2028 respectively, a performance audit, conducted by independent auditors which is acceptable to the Bank ; (vi) by August 31, 2027, and August 31, 2028, respectively, submit to the Bank an ESPR, in form and substance acceptable to the Bank, which provides a summary of the environmental performance of subprojects under implementation; and (vii) utilise the BNTF module of the Bank's CRM Platform for recording, tracking and monitoring of Project activities and expenditure, information sharing and research. <p>(b) Except as the Bank may otherwise agree, each Eligible Government shall review jointly with the Bank, the membership, roles and operational rules of OEs in order to improve the effectiveness of OE. Any revisions to the composition of the OE or the provisions of the OM shall require the Bank's prior approval in writing.</p>
18.	Reports and Information	<p>Except as the Bank may otherwise agree, each Eligible Government shall furnish or cause to be furnished to the Bank the reports and information set out in the BNTF 11 Programme Reporting Schedule in the form specified therein, or in such form or forms as the Bank may require, not later than the times specified therein for so doing.</p>
19.	Suspension and Cancellation	<p>The Bank shall have the right to suspend or terminate the right of OE to approve sub-projects under BNTF 11 in the event that the Bank is not satisfied with the manner in</p>

		which such right is being exercised, or for any other reason relating to the implementation or administration of the Project.
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