

**CARIBBEAN OCT REGIONAL DEVELOPMENT  
COLLABORATION AND EXCHANGE HUB (The CARIBBEAN-OCT Hub)**

**TERMS OF REFERENCE**

**Training and Capacity Development Consultancy, the Caribbean-OCT Hub**

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## 1. Background and Description of the RESEMBID Programme

The Resilience, Sustainable Energy, and Marine Biodiversity Programme for Caribbean Overseas Countries and Territories (hereinafter: the Programme) is a €40M programme financed by The European Union (EU) and implemented by Expertise France (EF). The Prime Minister of Sint Maarten currently performs the role of Regional Authorising Officer (RAO) for the Programme.

The Programme is being implemented in twelve Caribbean Overseas Countries and Territories (OCTs):

- Aruba, Bonaire, Curaçao, Saba, Sint Eustatius, Sint Maarten
- Anguilla, British Virgin Islands, Cayman Islands, Montserrat, Turks and Caicos Islands
- Saint-Barthélemy.

The Programme has been under implementation since 2019 and has achieved a portfolio of 48 projects valued at €24M, representing approximately a 99% approval rate on programmable funds. With a portfolio of 48 projects, RESEMBID will in the long-term, contribute to the environmentally sustainable human development of the 12 OCTs by realising the following outcomes linked to three priority focus areas:

1) **Resilience** – helping Caribbean OCTs to adapt to extreme and recurrent natural events. Capacity to cope with the effects of major natural extreme events is limited in the OCTs, and in this regard, there is a need to reduce structural vulnerability and increase the resilience of economic infrastructure and fragile coastal ecosystems to extreme recurrent natural events. Capacity development in this area continues to be necessary and strategically critical.

2) **Sustainable Energy** - The RESEMBID Programme seeks to support the OCTs by strengthening the delivery of resilient energy services to their populations. This means increased capability of the people to use and maintain innovative technologies, whilst contributing to low carbon development locally and regionally. RESEMBID provides substantive technical assistance through a myriad of channels including the provision of technical training in energy efficiency and renewable energy, the commissioning of feasibility studies and subsequent pilot and proof-of-concept projects in-country.

3) **Marine Biodiversity** – improving protection and sustainable management of the marine biodiversity of the OCTs. This focus area aims to protect and conserve the marine ecosystems of the 12 OCTs. To do this, RESEMBID is working with the OCT governments and their stakeholders to implement projects in five areas – marine ecosystem conservation; sustainable fisheries; marine protected areas management; sustainable finance and the blue economy; and environmental education.

The RESEMBID Programme is anchored in and driven by the needs and priorities of the OCTs. It is implemented through OCT-owned projects that are designed to advance sustainable human development of their societies.

An important strength of the RESEMBID Programme is the opportunity it provides the OCTs to connect and exchange on the development issues, strategies and activities that are most salient to them, particularly in the priority areas of activity of the Programme. This connection is facilitated at the governance level through the Strategic Steering Committee (SSC) and at the programmatic level through the implementation of multi-country regional projects. Finally, the hosting by the Programme of Communities of Practice sessions encourages the sharing of best practices and learnings among the implementing partners. In this way, RESEMBID is laying the groundwork for regional collaboration amongst the OCTs.

## 2. The Caribbean OCT Regional Development Collaboration and Exchange Hub

Sustaining the results and efforts of technical cooperation programmes is essential for lasting development impact. The OCTs face numerous challenges in this area, but these can be addressed through regional exchange and mutual learning. Currently, the Caribbean OCTs lack such a structured platform for collaboration, which would be instrumental for the OCTs to maximise sustainable internalisation of results post-RESEMBID specifically, and to advance regional dialogue and a joint development agenda more broadly.

The Caribbean-OCT Hub project (hereinafter: the Hub) is the result of consultation with and engagement of the OCTs in the design and implementation of the project, the overall objective of which is to contribute to fostering the regional integration of the Caribbean OCTs in the advancement of the sustainable human development of their people. The Hub project's intention is to enable Caribbean OCTs to share development practices, fostering regionalism and an OCT-led policy dialogue. Arising from the consultation process, the consensus on the objectives and approach yielded the following priorities for the Hub:

1. Training and capacity development
2. Access to technical expertise and knowledge exchange
3. Developing the collective development agenda for oct sustainability

The Hub is the vehicle designed to contribute to regional integration and sustainable human development by providing the platform for the Caribbean OCTs to be able to:

- Share structured feedback on successes and challenges in the implementation of the Programme
- Strengthen connectivity, cross-fertilisation, and collaboration among Caribbean OCTs
- Discuss common development challenges, solutions and opportunities of common interest
- Foster regionalism

The Hub will facilitate organised inter-OCT connections and collaborations on shared development challenges and opportunities. Key intended outputs include inter alia, regional events, upskilling sessions, round table meetings, and high-visibility networking events to connect the OCTs with entities and persons in development financing and to raise awareness of development priorities and achievements of the Caribbean OCTs.

The Hub outcomes will be assisted by the provision of funding and other resources from the RESEMBID Programme to the OCTs. Accordingly, the Hub will contribute concretely to greater impact of the RESEMBID Programme, regional integration, and sustainable human development amongst Caribbean OCTs. The Hub project implementation period will end on 30<sup>th</sup> June 2025.

The Hub objectives are to:

1. Deepen internalisation and future sustainability of RESEMBID project results through compilation of **learnings** from the implementation of the Programme
2. Foster inter-OCT **regional connection, proactive exchange and collaboration** on development challenges and opportunities of common interest
3. Strengthen OCT capacity for **development financing** to plan strategically for post-RESEMBID programming

## 2.1. Needs determination – Capacity Development Training

In preparation for the post-RESEMBID period, the OCTs have indicated the need to enhance their capacity to independently engage in various aspects of project life cycle management after the transition from RESEMBID support. They have identified inter alia, the following areas of capacity development need:

- The technical assistance project cycle management (PCM): identification, formulation, design, implementation management and evaluation, with a particular emphasis on design and use of the logical framework, and specific aspects of the PCM:
  - Project narrative and financial reporting
  - Project monitoring and evaluation
  - Project formulation and development

The OCTS have also requested complementary support in the form of a repository that will serve as a reference tool to assist them in the post RESEMBID period. This data base will include for example, materials used in the capacity development intervention. The establishment of the repository is the subject of another consultancy contract.

It is acknowledged that for the initiatives being and to be implemented to have optimal impact and effect on the countries and individual beneficiaries, it is important and imperative that the service providers are persons who understand the people of/in the region, their background, challenges, motivations and needs, and who can demonstrate significant experience in the Caribbean.

## **3. Summary of Role and Purpose**

This consultancy is required to design, deliver and organise a 4-month, 2-phased capacity development programme of blended training for individuals from the 12 OCTs. The capacity development training programme will be structured as:

### *Phase 1*

Initial **4-day intense in-person foundation training** (minimum two trainings) **covering the fundamentals of Project Life Cycle Management** in a Caribbean OCT venue to be determined.

Potential topics include: needs assessment; problem and stakeholder analysis; linking the needs assessment and analysis results to project identification; project formulation and design; logical framework and theory of change; workplan; risk management; sustainability; budgeting and financial management; monitoring and evaluation; and reporting.

### *Phase 2*

While Phase 1 will provide a general overview of the PCM, it is intended that Phase 2 will delve deeper into selected topics that align with the expressed needs of the OCTs. **Three 3-week online electives** will focus on such topics as:

- **Project budgeting, financial management and reporting**
- **Project reporting, monitoring, and evaluation**
- **Project identification, formulation, and design**

## 3.1. Participation

Total participation is estimated to be in the range of 36-48 participants for the in-person training session and a maximum of 60 participants for the online electives.

The participants will be employees of the Governments in the 12 OCTs. Selection of participants will be at the discretion of the 12 OCTs.

#### 4. Scope of Work

The entire programme will consist of the foundation course and three electives and will result in the award of Certification on Completion of the programme. It will be divided into the following stages:

##### **Stage 1** (number of days per stage/deliverable are provided below)

##### *Situation needs review and assessment and course design*

- Conduct desk review of RESEMBID Programme documents, including the concept notes and project documents application forms, call for proposals guidelines, narrative and financial reporting forms (including MEAL report form).
- Conduct meetings (virtual) with the RESEMBID Team, Focal Points (FP) and Implementing Partners (IPs) to (1) ascertain in greater detail the nature of the PCM capacity development needs of the OCTs/IPs and (2) assess and determine the level(s) at which the programme will be structured and delivered. This will help to inform the design of the programme
- Identify any relevant PCM resource needs not identified or highlighted by the FPs or the IPs
- Identify support materials needed and sources
- Draft design of (a) in-person training and (b) online courses to include:
  - Course description
  - Course rationale
  - Course objectives
  - Learning outcomes
  - Course content
  - Teaching methodology and mechanism for participants' performance assessment
  - Articulation of successful completion
  - Resources needed by the participants (e.g. laptop)
  - Handouts and recommended reading material
  - Evaluation tools for in-person training and electives
- Conceptualisation and organising the in-person training that includes:
  - Identification and proposal of accommodation and training venue, including venue setup based on the training requirements
  - Identification and proposal of the ICT requirements based on the training requirements
- Identification and proposals of an application for the online courses (e.g. Microsoft Teams, Zoom etc.)
- Consultation meeting(s) with the Hub Management.

##### **Deliverable #1** – Early May 2025

- Report #1 detailing:
  - Work done to date, observations and notable general findings
  - Identified risks and mitigation efforts
  - Listing of identified needs as described by the OCTs
  - Listing of any identified gaps in the FPs and IPs needs determination
  - Any collateral feedback from the OCT engagement
  - Materials and resources from the in-person training and online electives to be included in the Hub repository

- Draft design and plan of (a) in-person training and (b) online courses to include:
  - Course description
  - Course rationale
  - Course objectives
  - Learning outcomes
  - Course content
  - Teaching methodology
  - Resources needed by the participants (e.g. laptop)
  - Recommended reading and preparatory material
  - Market research report with price estimates for the in-person training that will include: meeting venue and venue setup (including any necessary equipment), travel and accommodation costs for the participants, meals and refreshments required for the training.
  - Draft questionnaire for the evaluation of the training and electives by the participants

## Stage 2

### Course Phase 1

- Delivery of phase 1 training course to participants
- Arrangements, logistical, administration, and preparation of the training to run in a timely and effective manner.
  - Travel arrangements for the participants and selection of accommodation based on the training requirements, including eventual per diems and related payments
  - Basic administration support to run the trainings
  - Resource management to support the trainings
  - Supplying information and documentation about all the logistical and financial aspects (e.g. tickets, the meeting venue, refreshments, invoices etc.) to the RESEMBID Grants, Finance and Administration Unit (GFA) further processing.
- Participants' evaluation of the trainings
- Preparation of participants for Phase 2 of the training e.g. selection of elective(s)
- Identification of the delivery time, frequency, and length of the online sessions (e.g. three sessions per week, each 2-hours long)
- Consultation meeting with the Hub Management to report on stage 2

### Deliverable #2 – end of May 2025

- Consultation meeting with the Hub management to report in stage 2
- Report on Phase 1 training, highlighting work done to date and
  - Analysis of participants' performance
  - Participants' training evaluation summary
  - Collateral findings and feedback
  - Any necessary modification to Phase 2
  - Participants' selection of electives for Phase 2
  - List of participants for each elective
  - Timetable for electives
  - Photos and other visibility materials
  - Materials from the training, and other relevant materials for inclusion in the repository



### Stage 3

#### Course Phase 2

- Delivery of electives to participants
- Participants' evaluation of the trainings

#### Deliverable #3 – end of July 2025

- Consultation meeting with the Hub management to report on stage 3
- Report on Phase 2 highlighting work done to date and
  - Result and analysis of performance assessment
  - List of attendance overall and per session
  - Participants' training evaluation summary
  - Collateral findings and feedback
- Recordings from the online electives sessions
- Final report summarising
  - Highlights of Implementation
  - Feedback from participants
  - General findings and comments
  - Recommendations for going forward, applicable to the participants

Table 1 Indicative number of days per stage/deliverable

Stage/Deliverable	Number of days
Stage/Deliverable 1	27
Stage/Deliverable 2	52
Stage/Deliverable 3	35
<b>Total</b>	<b>114</b>

#### 4.1. Language

The trainings, electives and materials should be delivered in English language.

### 5. Qualifications and Experience of the Team of Experts

The team that will implement the contract will consist of:

- Key expert 1/Team leader – estimated 50 workdays
- Key expert 2 – estimated 24 workdays
- Key expert 3 – estimated 10 workdays
- Key expert 4/Logistical training coordinator – estimated 30 workdays

#### Key Expert 1/Team Leader

The Team Leader/Key Expert 1, in close cooperation with Key Experts 2 and 3, will provide technical expertise in the design of the methodology of the required service under this contract as well as in the delivery. In addition, the Team Leader/Key Expert 1 will have the overall responsibility for the sound management of the contract and the efficient use of project funds following Expertise France and EU rules. The Team Leader will be responsible for the field management of the team of experts and support staff. The Team Leader should ensure that critical backstopping is provided to address unforeseen problems and technical issues. He/she will be the main contact point for the RESEMBID programme.

The required qualifications and experience are:

- An advanced degree in public administration, economics, or any other field relevant to the tasks identified under this project.
- Minimum of 10 years' experience and in-depth knowledge of strategic planning and Project Management
- Project Management Certification (PMI, PRINCE2 or similar) would be considered as an advantage
- Minimum of 5 years' experience in the design, administration, delivery, and reporting of adult training material
- Minimum of 5 years' experience teaching adult learners
- Knowledge of challenges experienced by the Government ministries and departments in small island developing states
- Experience managing complex agendas and the interests of multiple, diverse stakeholders in dynamic and sensitive environments
- Appreciation of cross-cutting development issues
- Demonstrated experience in working with government partners and other stakeholders in public sector development programs especially in the area of capacity development
- Proven experience as a trainer in the Caribbean will be considered a distinguished advantage.
- Familiarity with knowledge management, especially with respect to distilling, curating and communicating key learnings on project performance and results
- Demonstrated ability to build alignment among stakeholders
- Sectoral expertise in any of the programme thematic areas would be highly valuable.
- Ability to write clearly and concisely and have strong communications skills and ability to interface effectively with various stakeholders
- Strong teamwork and interpersonal skills
- Proficiency in the use of Microsoft Office Suite
- Experience working on EU funded projects would be an asset

### Key Expert 2 & Key Expert 3

The required qualifications and experience for Key Expert 2 and Key Expert 3 are:

- A degree in public administration, economics, or any other field relevant to the tasks identified under this project.
- Minimum of 8 years' experience and in-depth knowledge of project cycle management, in particular: budgeting, financial management and reporting; MEAL; and/or project proposal writing (project formulation and development)
- Minimum of 5 years' experience teaching adult learners
- Experience managing complex agendas and the interests of multiple, diverse stakeholders in dynamic and sensitive environments
- Familiarity with knowledge management, especially with respect to distilling, curating and communicating key learnings on project performance and results
- Sectoral expertise in any of the Programme's priority focus areas would be highly valuable.
- Ability to write clearly and concisely and have strong communications skills and ability to interface effectively with various stakeholders
- Strong teamwork and interpersonal skills
- Proficiency in the use of Microsoft Office Suite
- Project Management Certification would be an asset
- Experience working on EU funded projects would be an asset



## Key Expert 4 – Logistical Training Coordinator

Key Expert 4 – Logistical Training Coordinator will provide logistical and administrative support to the Consultant's team and the Hub Management, feeding the GFA with the required information for proper implementation of the selected logistical solution and smooth arrangement of the related payments. The support includes assistance in booking flights and hotel facilities, obtaining invoices for the activities related to this contract and supporting documentation required for payment of those invoices, as well as any other logistical issues required for successful implementation of the activities.

The required qualifications and experience are:

- High-school diploma. Bachelor's degree (or equivalent) in hospitality management, public relations, business, economics would be considered as an advantage;
- Experience in event planning or event coordination in a corporate environment, experience in the Caribbean OCTs would be an asset
- Proven track record of successful events, preferably capacity development related events
- Excellent organisational, negotiating, and multitasking skills
- Ability to write clearly and concisely and have strong communications skills and ability to interface effectively with various stakeholders
- Strong teamwork and interpersonal skills
- Ability to remain calm under pressure and maintain a customer-service mindset
- Experience in managing budgets and tracking expenses
- Proficiency in the use of Microsoft Office Suite
- Proficiency in English, knowledge of other language(s) spoken in the 12 OCTs would be an asset

Backstopping staff: Backstopping and support staff costs must be included in the fee rates. All support staff should be fluent in written and spoken English.

## 6. Incidental expenditures

The provision for incidental expenditure covers ancillary and exceptional eligible expenditure incurred under this contract. It cannot be used for costs that should be covered by the Consultant as part of its fee rates, as defined above. Its use is governed by the provisions in the general conditions of the contract. It covers:

- **Travel costs and subsistence allowances** for missions, outside the normal place of residence undertaken as part of this contract. If applicable, indicate whether the provision includes costs for environmental measures, for example CO<sup>2</sup> offsetting;

The provision for incidental expenditure for this contract is EUR 30,000. This amount must be included unchanged in the budget breakdown.

Per diem are daily subsistence allowances that may be reimbursed for missions foreseen in this project or approved by the Contracting Authority, carried out by the Consultant's authorised experts outside the expert's normal place of posting, or by the participants assigned by the OCTs for specific training sessions, as described in the Deliverables that are a part of the Terms of Reference. The per diem is a maximum fixed flat-rate covering daily subsistence costs. These include accommodation, meals, tips, and local travel, including travel to and from the airport. Taxi fares are therefore covered by the per diem. Per diem are payable based on the number of hours spent on the mission. Per diem may only be paid in full or partially, depending on the logistical engagements for the training in question and the number of the meals provided during the training. A full per diem shall be paid for each 24-hour period spent on mission. No per diem should be paid for missions of less than 12 hours. Travelling time is to

be regarded as part of the mission. Any subsistence allowances to be paid for missions undertaken as part of this contract must not exceed EU per diem rates in force at the time of contract signature. The contracting authority reserves the right to reject payment of per diem for time spent travelling if the most direct route and the most economical fare criteria have not been applied.

**Prior authorisation by the contracting authority for the use of the incidental expenditure is mandatory.**

## 7. Management and Reporting Arrangements

- The RESEMBID Programme through the HUB project will be responsible for managing this contract. The Team of Experts will work under the supervision of the Senior Coordinator – The Hub, who is Task Manager for this Contract, and in close collaboration with the Programme Director.
- The Hub management will be responsible for:
  - arranging for the introduction of the experts from the Consultant's to the key stakeholders, the OCTs and other relevant parties.
  - assisting with resolving any operational and/or logistical issues which may arise
  - providing the names of and contact details for the designated participants
  - selection and contracting of vendors
  - payments to the vendors based on the supporting documentation provided by the Consultant (e.g. tickets, the meeting venue, refreshments etc.).
- The Consultant will be responsible for:
  - design, delivery and organisation of a 4-month, 2-phased capacity development programme of blended training for individuals from the 12 OCTs;
  - the tools (e.g. laptop, Zoom, Teams linkages) necessary to design and deliver the course;
  - communicating with the OCTs on training related information and details
  - assistance with the procurement procedures for the in-person training venue and accommodation, including all the necessary documentation;
  - organisation and execution of logistical aspect of the training (travel, accommodation, meals, refreshments, meeting venue and equipment);
  - adequate support and equipment for the Team of Experts. In particular, it must ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities;
- The Consultant, including its Team of Experts, will work remotely to undertake all other tasks outlined and prepare the relevant deliverables.
- Payments will be made based on the submitted timesheets, invoices and deliverables by the Consultant and the certificates of acceptance of the Task Manager, in line with the predetermined payment schedule.

### 7.1. Start date & period of implementation

The intended start date 15<sup>th</sup> April 2025 with an implementation period of four months in total.

### 7.2. Communication and visibility

The Consultant must comply with the European Union, Expertise France and RESEMBID communication and visibility requirements. Before initiating any information, communication or visibility activity, the Consultant has to contact the RESEMBID Communications and Visibility Manager. The RESEMBID Communications and Visibility Manager is responsible for monitoring the successful implementation of all visibility provisions.

### 7.3. Location

The operational base of this assignment is the location of the Consultant's office. The in-person trainings may take place in any of the 12 OCTs: Aruba, Bonaire, Curaçao, Saba, Sint Eustatius, Sint Maarten, Anguilla, British Virgin Islands, Cayman Islands, Montserrat, Turks and Caicos, and Saint Barthélemy or in the wider Caribbean region. Selection of the venue for the in-person training will be done by RESEMBID.

### **8. Instructions for Submission of Bids**

In order to access the tender consultation space or to submit a complete bid, bidders must connect to the French government procurement platform at: <https://www.marches-publics.gouv.fr>.