

**TERMS OF REFERENCE****COUNTRY PROJECT COMPLETION REPORT (CPCR) FOR  
THE BASIC NEEDS TRUST FUND TENTH PROJECTS – ST. VINCENT AND THE  
GRENADINES****1. BACKGROUND**

1.01 The Basic Needs Trust Fund (BNTF) is a programme funded by grants from the Caribbean Development Bank (CDB). It was initiated over 40 years ago and is currently in its tenth cycle. The BNTF Programme serves as a primary tool for the Bank to combat poverty by providing aid to impoverished and vulnerable communities in enhancing their access to basic services by providing social and economic infrastructure and developing skills to boost employability, community management, and engagement. On a national scale, the BNTF 10 Country Project grant includes funding for sub-project portfolios in three sectors: education and human resource development, water and sanitation, and basic community access and drainage. It also covers administration and implementation, institutional development, and monitoring and evaluation.

1.02 The Government of St. Vincent and the Grenadines has a BNTF Implementing Agency (IA) which falls under the Ministry of Agriculture Forestry, Fisheries, Rural Transformation, Industry and Labour for the execution of project grants. Sub-projects are generally implemented under tripartite agreements between the beneficiary community, the responsible public agency or civil society entity and IA. Portfolios of sub-projects are approved by a BNTF Oversight Entity (OE) and the IA manages the sub-project implementation and the day-to-day activities of each Project. The core staff includes a Project Manager (PM), a Community Liaison officer (CLO), a Project Engineer (PE), an Administrative/Accounting Officer (AAO) and a Monitoring and Evaluation Officer (MEO).

1.03 In accordance with CDB's Operations Manual and the Grant Agreement, an independent Country Project Closing Report (CPCR) shall be prepared, highlighting the impact of BNTF sub-projects on beneficiaries (men and women, youth, older persons, institutions) and the sustainability of such impact. The country-level report is meant to capture the degree to which the BNTF 10 Country Projects achieved their development objectives and delivered the outputs and outcomes as set out in the Country Poverty Framework (CPF) and detailed in the Country Project Portfolio (CPP) and the results monitoring frameworks for sub-projects. Prospects for the project's sustainability must also be assessed.

1.04 The CPCR is the central component of the BNTF Programme assessment and is done at the end of each Programme phase. It assesses the overall contribution of the BNTF 10 Projects. It also draws on data from the documentation submitted at appraisal including Sector Portfolios, Community Needs and Assets Assessments (CNAAs), Organisational Needs Assessments (ONAs), Environmental and Social Management Plans (ESMPs), Gender Screening Checklists; and separately from Sub-project Monitoring Reports (SPMRs), Sub-project Completion Reports (SPCRs), as well as the Annual Project Performance Reports (APPRs) and the Mid-Term Evaluation (MTE) of BNTF 10. The BNTF 10 Project assessments should also include, if available, a set of case studies and beneficiary assessments which the CPCR draws on to provide a wider analysis of BNTF Country Project performance.

1.05 The Government of St. Vincent and the Grenadines now seeks to engage a consultant to prepare the CPCR for the BNTF 10 Country Project.

## **2. OBJECTIVE**

2.01 The main purpose of this consultancy is to prepare the BNTF 10 CPR (based on the guidance presented in the Appendices).

2.02 Specifically, the Consultant shall:

- (a) Conduct and present an assessment of the performance of the grant, outcomes and outputs within the context of the Country Projects' goals, design, processes and results during implementation.
- (b) Assess if and how, any of the recommendations made in the MTE of BNTF 10 were taken into account.

## **3. SCOPE OF WORK**

3.01 The consultant will prepare the BNTF 10 CPR under the guidance and supervision of the IA. The assignment will consist of desk research and data collection from the field, focusing on completed project activities carried out during the implementation of the grant.

3.02 The following activities are required in the execution of duties under this consultancy:

- (a) Reviewing relevant BNTF 10 documentation submitted at appraisal including Sector Portfolios, CNAAs, ONAs, ESMP and Gender Screening Checklists and during sub-project implementation, progress reports, APPRs, SPMRs, SPCRs, Performance Audits, Oversight Entity minutes and other minutes of meetings.
- (b) Reviewing and applying the Assessment Criteria (see Appendix 2) for the assignment developed in 2014 (Strategic and Poverty Relevance; Results - Efficiency, Effectiveness, Sustainability; Cross-cutting issues such as Gender Equality and Environmental Management and Management Factors).
- (c) Conducting interviews with staff of CDB, IA, OE and other implementing ministries, agencies and sub-project beneficiaries to obtain important Country Project information and their input to the assessment of BNTF 10.
- (d) Reviewing, where available, and drawing on available beneficiary assessments, case studies and videos to complete the Country Project Report (maximum 25 pages) (see guidance template at Appendix 3).
- (e) Analysing validity and usefulness of report data on outcomes, outputs, results and lessons learned to be incorporated into the CPR as appropriate.
- (f) Visit sub-project site and collect primary and secondary data on outcomes and the verification of outputs.
- (g) Based on (a) to (e) above, providing the evidence of outputs, outcomes and key findings, conclusions and main recommendations, including the accountability to stakeholders and the performance of the IA.

## **4. DURATION**

4.01 The assignment will include in-office, virtual working arrangements, and field visits. The consultancy shall be executed over three months.

## **5. DELIVERABLES AND REPORTING REQUIREMENTS**

5.01 The Consultant will report to the Project Manager at the IA. He/she will be responsible for the submission of the following within the agreed timeframes:

- (a) A Work Plan (including the approach to completing the report based on prior work relating to the assignment) within two (2) weeks of commencement of the assignment.
- (b) A draft CPCR within six (6) weeks of the commencement of the assignment (Template at Appendix 3).
- (c) A final CPCR incorporating any significant amendments or inclusions within eight (8) weeks of the commencement of the assignment.

5.02 The Final Report should be provided in electronic version using the Microsoft Suite (Word/Excel etc.) and PDF format. All electronic files shall be provided to the IA.

## **6. QUALIFICATIONS AND EXPERIENCE**

6.01 The Consultant should possess the following minimum qualifications and experience:

- (a) Post-graduate qualifications in Development Studies, Project Management and Evaluation, and/or any other relevant social science degree.
- (b) At least ten years of working experience in social research, project/programme monitoring and evaluation.
- (c) Experience working for CDB in the Caribbean region, (preferably BNTF Programme) or any other international organisation is highly desirable.
- (d) Excellent interpersonal communication skills, and demonstrated ability to work and collaborate with a wide range of local and international partner organizations.
- (e) Ability to work independently and to manage multiple tasks.

**ASSESSMENT CRITERIA AND KEY ISSUES FOR THE BNTF 10**  
**COUNTRY PROJECT COMPLETION REPORT**

The matrix below sets out the main assessment criteria and some of the key issues and factors to be considered in the Country Projects review and analysis work, including case studies, beneficiary assessments, interviews, and focus groups. The matrix will be reviewed when on-line survey returns become available and after initial analysis of tentative findings or conclusions from the survey.

<b>Assessment Criteria</b>	<b>Key Issues and Factors to be Taken into Account</b>	<b>Performance Assessment Questions/Indicators</b>
<b>RATIONALE AND DEVELOPMENT RESULTS</b>		
Relevance	Alignment with BNTF 9 CPF, CPP and CDB's overarching strategic objective of reducing poverty through social and economic development.	<ol style="list-style-type: none"> <li>1. To what extent are sub-projects portfolios aligned with country CPF sector allocations, CPP expected SDF level 2 outputs and outcomes and CDB strategic objectives and/or CSDGs?</li> <li>2. Are sub-projects interventions well-targeted?</li> <li>3. To what extent are sub-projects aligned with, or contributing to, achievement of particular SMDGs</li> </ol>
	Capability enhancement.	<ol style="list-style-type: none"> <li>1. Have benefitting communities demonstrated an enhanced level of involvement and control over the future development of their livelihoods?</li> </ol>
	Reduction of vulnerability.	<ol style="list-style-type: none"> <li>1. Have sub-projects helped to establish more stable household incomes, more gender-equitable decision-making, reduced health risks as well as other risks associated with environmental and other hazards and conflict?</li> <li>2. Has the social vulnerability of disadvantaged communities, groups and individuals been reduced in targeted communities?</li> </ol>
	Good governance.	<ol style="list-style-type: none"> <li>1. Extent of involvement of local communities and beneficiaries in sub-project selection, planning, implementation and operation as partners?</li> <li>2. Has BNTF 9 had any negative or positive influences on the policies, practices procedures or</li> </ol>

Assessment Criteria	Key Issues and Factors to be Taken into Account	Performance Assessment Questions/Indicators
		orientation of partner agencies and government departments?
Effectiveness (achievement of objectives, outcomes)	Contribution to institutional development, equity (social inclusion), improvements in targeting poor people, increasing incomes of poor households and improvements in the quality of life in socially and economically deprived communities.	<ol style="list-style-type: none"> <li data-bbox="816 373 1398 548">1. To what extent have targeted sub-project interventions produced expected outcomes that have enhanced institutional development, equity (social inclusion), quality of life and income-earning opportunities for householders?</li> <li data-bbox="816 632 1390 737">2. How relevant were market infrastructure development and human resource development sub-projects to actual market opportunities?</li> <li data-bbox="816 821 1414 957">3. On a scale of 1 to 5 with 5 representing the highest level, what is the level of satisfaction of beneficiaries with sub-project outcomes under BNTF 10; and how does it compare with BNTF 9?</li> <li data-bbox="816 1052 1409 1157">4. Have marketable skills been transferred to individuals or community groups enabling them to access or improve employment?</li> <li data-bbox="816 1241 1406 1346">5. How effective have targeting mechanisms been in reaching the poor and disadvantaged persons and communities?</li> <li data-bbox="816 1367 1295 1440">6. Have cohesion and leadership in communities been strengthened?</li> <li data-bbox="816 1524 1398 1661">7. Have sub-projects catalyzed or mobilized communities to improve the development and management of vulnerable community resources (including human resources)?</li> </ol>

<b>Assessment Criteria</b>	<b>Key Issues and Factors to be Taken into Account</b>	<b>Performance Assessment Questions/Indicators</b>
Sustainability	Is sustainability of expected benefits adequately addressed in design, implementation, and operational phases of sub-projects?	<ol style="list-style-type: none"> <li>1. To what extent have communities been willing to become involved in maintenance?</li> <li>2. How appropriate/reliable have been maintenance arrangements with communities and ministries?</li> <li>3. Has strengthening of community leadership and organization affected sustainability of outcomes?</li> <li>4. Have youth seen support for and engagement in sub-project operations as integral to their own future welfare?</li> <li>5. Have any long-term strategic partnerships between BNTF, government ministries, community-based organizations and development agencies increased or expanded in BNTF 10?</li> </ol>
<b>MANAGEMENT FACTORS</b>		
Mainstreaming of Cross-cutting issues.	Gender equality.	<ol style="list-style-type: none"> <li>1. To what extent has there been mainstreaming of gender analysis in poverty and institutional analyses?</li> <li>2. Were approaches and resources adequate to ensure that sub-projects analyses, and designs are gender-sensitive?</li> <li>3. Do sub-projects documents identify gender-based barriers to access to infrastructure, economic, social, and political resources?</li> <li>4. Are PCs held accountable for demonstrating gender equality outcomes in the results framework?</li> </ol>

Assessment Criteria	Key Issues and Factors to be Taken into Account	Performance Assessment Questions/Indicators
		<p>5. Have women and men participated in decision-making at community and institutional levels?</p>
	Gender equality.	<p>1. Is there gender balance in the staffing of design and implementation teams?</p> <p>2. Do all sub-projects include gender-responsive (including remedial) measures?</p> <p>3. Have the more gender-responsive sub-projects produced better results across evaluation criteria?</p>
	Environmental sustainability, disaster risk management and climate change.	<p>1. Have natural resource inputs for sub-projects and consideration of environmentally sensitive resources been appropriately analyzed?</p> <p>2. Did sub-projects preparation include analyses of natural elements that provide ecosystem services/environmental protection (e.g., wetlands, sinkholes, vegetation)</p>
Efficiency	Reduction of inadequacies in the quality at entry of sub-projects, protracted approval processes and delays at various stages in the sub-project cycle.	<p>1. What have been the trends in the duration of various stages in the sub-project cycle?</p> <p>2. Have the timeliness and level of public expenditure provisions been consistent with agreed counterpart funding requirements?</p>
Implementation Performance	Project design elements.	1. What is the contribution of BNTF sub-projects and programme design to slow implementation?
	Results management and reporting framework.	1. Has there been flexibility of sub-projects execution arrangements to permit adaptation to changed conditions, unanticipated developments/risks and community concerns to achieve expected outcomes?

Assessment Criteria	Key Issues and Factors to be Taken into Account	Performance Assessment Questions/Indicators
		<p>2. What is the adequacy of monitoring and evaluation systems for providing feedback on project impacts/issues?</p> <p>3. What have been the usefulness and frequency of sub-project monitoring and sub-project completion reports in enabling continuous learning and improvement through information analysis and sharing?</p> <p>4. On a scale of 1 to 5 with 5 representing the highest level, what is the level of beneficiary satisfaction with facilities provided under BNTF 10 compared to earlier Country Projects that did not incorporate results-based management?</p>
	<p>Implementing agency performance.</p>	<p>1. Adequacy of IA staff and other available country-level resources under BNTF 10 for performing M&amp;E functions, effecting a results-based management approach to sub-project portfolios, mainstreaming gender, environment and other cross-cutting concerns and management of fiduciary systems?</p> <p>2. How have systems, processes and the skills mix in IA and OE impacted selection, preparation and implementation of sub-projects?</p> <p>3. Have SPMRs been prepared regularly for review by CDB and OE so that necessary actions can be taken to ensure achievement of outcomes?</p> <p>4. On a scale of 1 to 5 with 5 representing the highest level, what is the level of beneficiary satisfaction with the IA?</p>



<b>Assessment Criteria</b>	<b>Key Issues and Factors to be Taken into Account</b>	<b>Performance Assessment Questions/Indicators</b>
	Contractor/ Consultants Performance	1. Assesses the performance of Contractors/Consultants and Suppliers with respect to the schedule, cost and quality performance.
	CDB Performance	1. Bank performance should be assessed in terms of its overall performance during the entire project cycle. Assessment of the intervention should commence with Quality at Entry and continue during implementation with regard to the Quality of Supervision. Such assessments should take into account the intervention's operating environment, sector and country contexts as it affects the intervention's outcomes.
	Procurement of Good works and Services	1. Assess the efficiency of the IA in procuring goods, works and services.

**TEMPLATE FOR BNTF CPR**

**(Maximum 25 Pages for the Main section of the Report. To be adapted as appropriate)**

**A. SUMMARY OF FINDINGS AND RECOMMENDATIONS (use bullets)**

**B. COUNTRY PROJECT COMPLETION REPORT METHODOLOGY (use text and bullets where appropriate)**

**B1. Objectives**

**B2. Background and Rationale**

- Relevant country descriptors
- Poverty situation and reduction initiatives
- Target groups

**B3. CPR Methodology**

- CDB requirements – note that CPRs are to be used for development of the overall BNTF 10 Programme Closing Report.
- Use of Assessment Criteria Matrix, and (for countries where these have been undertaken) case studies and beneficiary assessments.

**C. COUNTRY PROJECT SUMMARY (including quantitative information and financial status)**

- Key dates for the Country Project

<b>ITEMS</b>	<b>PLANNED DATE</b>	<b>ACTUAL DATE</b>
Conditions Precedent to First Disbursement		
First Disbursement of Grant		

**APPENDIX 3**

CPF Approval		
Sector Portfolio approval - EHRD		
Sector Portfolio approval - WSS		
Sector Portfolio approval - BCAD		
Sector Portfolio Addendum approval - EHRD		
Sector Portfolio Addendum approval - WSS		
Sector Portfolio Addendum approval -BCAD		
Terminal Disbursement Date		

\*For Sector Portfolios, approval dates based on specifics in the IA's **final submission** of the **Country Project Portfolio**

- Country allocation and matrix of project costs and financing plan.

**MATRIX OF PROJECT COSTS AND FINANCING PLAN (USD)**

COMPONENT	CDB		CDB % Difference	Counterpart (USD)		Counterpart % Difference
	Planned	Actual		Planned	Actual	
1.						
2.						
3.						
4.						
5.						
6.						
<b>TOTAL PROJECT COST</b>						

- Table listing BNTF sub-projects with allocations/approvals/cancellations (if any) disbursements to date/status of completion/number of beneficiaries and a column for notes/observations, e.g., pace of disbursements, issues (use footnotes for brief explanations).
- Brief (one paragraph) summary for each sub-project including nature of expected benefits/results.

**D. ORGANISATIONAL STRUCTURE AND INSTITUTIONAL ROLES AND CAPACITY**

- Oversight Structure (OE, IA, etc.) – changes from BNTF 9 and prospective changes for BNTF 11, if these are significant.
- Use a diagram or chart to show organisational roles/relationships if possible.
- Institutional Capacity (OE/IA) (*institutional performance can be covered in Section F below*).

- Review any identified key changes in OE/IA organisational responsibilities/relationships from BNTF 9 or envisaged for BNTF 11.
- have issues previously identified (e.g., in BNTF 9 CPR/MTE, BNTF 10 Mid-Term Evaluation, if applicable,
- Role of CDB and any identified issues.

**E. ASSESSMENT CRITERIA AND KEY ISSUES: RATIONALE AND DEVELOPMENT RESULTS**

- Strategic Relevance (*see matrix*).
- Poverty Relevance (*see matrix*).
- Effectiveness (*efficacy, achievement of objectives, outcomes, community empowerment, etc.*) (*include results/outcomes at different levels, e.g., beneficiary use of services, access to increased income, empowerment, community satisfaction with services, etc.*) (*See matrix*).
- Risks (*see matrix*).
- Sustainability (*see matrix*) (*take into account any maintenance, tariffs, institutional capacity and community support/buy in/rejection issues, any multiplier effects and innovation*).

**F. ASSESSMENT CRITERIA AND KEY ISSUES: MANAGEMENT FACTORS**

- Mainstreaming of cross-cutting issues<sup>1/</sup>.
  - *Gender (see matrix)*
  - *Environment, natural disasters (see matrix)*
  - *Good governance (community involvement/empowerment, etc.) (see matrix)*
- Efficiency (*see matrix*)
- Implementation Performance (*see matrix*)

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<sup>1/</sup> Interview CDB BNTF Operations Officer (Gender and Development) and the Community Liaison Officer(s).

- *project design/results management and reporting (changes in BNTF 9 and planned for BNTF 10);*
- *IA performance including sub-project supervision (organisational structure/CDB supervision and performance/IA performance can be covered under Section D);*
- *Use of baseline, performance indicators, tracking, monitoring, reporting results, data gathering systems and difficulties, portfolio management efforts, problem-shooting and risk management, in-country results management difficulties;*
- *Implementation constraints;*
- *Implementation successes; and*
- *Lessons learned.*

**G. SUMMARY OF CASE STUDY(IES) AND BENEFICIARY ASSESSMENT<sup>2</sup>** (Where/if applicable and a fuller report can be provided separately).

**H. OVERALL PERFORMANCE OF THE BNTF 10 PROJECTS**

- Overall assessment
- Key points in bullet form
- Forward looking perspectives; offering some options for the future.

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<sup>2</sup> Refer to and draw on any case studies and beneficiary assessments conducted by previous consultants for BNTF participating countries. *No additional* case studies and beneficiary assessments are to be conducted.