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**GENERAL SECRETARIAT OF THE ORGANIZATION OF AMERICAN STATES
SECRETARIAT
DEPARTMENT OF PLANNING AND EVALUATION**

Call for resumes:

“Coordination of CARICOM's Caribbean Sustainable Energy Roadmap and Strategy (C-SERMS)”

SID-1603”

Type of Appointment: individual consultancy

Organizational Unit: Department of Planning and Evaluation

Duration: 40 non-consecutive days

Remuneration: Based on experience, education and skills.

Work Place: Consultant’s place of residence, participating countries and Washington DC

Application deadline: April 16, 2019

Profile: The consultant must: demonstrate a minimum 10 years of expertise in project evaluation; have attained a graduate degree in public policy, economics, management or related area; and have experience working in Latin America and the Caribbean. In addition, the consultant should be proficient in the use of the English and Spanish language, oral and written. Experience in Knowledge on sustainable energy is not a requirement but will be a plus.

I. BACKGROUND:

At the request of the US Permanent Mission the Department of Planning and Evaluation (DPE) is coordinating an external assessment of the project “Coordination of CARICOM's Caribbean Sustainable Energy Roadmap and Strategy (C-SERMS)” (SID-1603). This assessment is part of the DPE greater efforts to conduct formative and summative evaluations of projects and programs executed by the OAS. Such efforts, coordinated and supervised by the DPE, began over 9 years ago with the evaluation of initiatives financed by the Spanish Fund for OAS and has been extended to operations financed by other donors, such as Canada and the United States of America. These evaluations, in addition to systematizing and documenting the results of the interventions, have the goal of capitalizing on these experiences for the improvement of future project and program formulations and designs, and institutionalizing best practices in monitoring and evaluation within the Organization and counterparts.

The project.

To meet the demands for modern, secure, reliable, efficient, cost-effective energy services, the Caribbean countries need to go through significant changes in the sector. To help in this endeavor numerous funding partners are currently working side-by-side with Caribbean countries to overcome energy challenges, including the generation, distribution and use of energy, and the heavily dependence on imported fossil fuels. Among such partners are: the Caribbean Community (CARICOM) Secretariat; the Organization of Eastern Caribbean States (OECS) Commission; the Caribbean Development Bank (CDB); the World Bank Group; the Inter-American Development Bank (IDB); the International Monetary Fund; the European Union; and a diverse number of governments, such as Canada, Colombia, Denmark, France, Germany, Japan, Mexico and the United States of America. However, the lack of coordination among donors and partners, as well as overlapping actions on the ground, is hampering these efforts. As a result, the resources provided by funding agencies and development partners are not achieving their full potential.

Recognizing the need to develop a coordinated regional approach to expedite the uptake of modern energy services, CARICOM adopted its Regional Energy Policy in 2013. The policy charts a new climate-compatible development path that harnesses domestic renewable energy resources, minimizes environmental damage, and spurs social opportunity, economic growth, and innovation. Subsequently, the CARICOM Secretariat developed the Caribbean Sustainable Energy Roadmap and Strategy (C-SERMS), to:

- i) translate the goals of the 2013 Regional Energy Policy into action;
- ii) to enhance donor coordination and;
- iii) to reduce duplication of efforts in energy and climate.

C-SERMS is a baseline report and assessment designed to build on existing energy security efforts in the region and to provide CARICOM member states with a coherent strategy for transitioning to sustainable energy. Thus, the General Secretariat of the Organization of American States (GS/OAS) was tasked to assist CARICOM in implementing C-SERMS as a platform to coordinate the support required by the region to transition toward enhanced energy services. Specifically, GS/OAS has provided technical, political and administrative backstopping in the definition, implementation and follow up of the priorities identified by the project's thematic working groups on policy and regulation, capacity building and research, finance, information and knowledge management, finance, and geothermal. Additionally, GS/OAS has managed energy information in partnership with NREL and CESC, and supported the Technical Advisory Group to generate key recommendations on policy, technology and technical assistance. GS/OAS also sits on said governing body comprised of governments and donors.

This proposal has supported the implementation of C-SERMS, conceived not just as a baseline report and assessment, but rather as a multi-stakeholder coordination platform. Project activities have contributed to the coordination of donors and of interventions on sustainable energy executed by development partners in the Caribbean. These actions are expected to increase the efficiency and efficacy of donor, investor, and developer efforts in order to advance adequate and appropriate energy governance and regulatory structures, leading to increased investments, private sector engagement, and infrastructure modernization.

The purpose of the project to be evaluated is to support the implementation of CARICOM's Caribbean Sustainable Energy Roadmap and Strategy (C-SERMS), by facilitating the coordination among energy donors

and stakeholders. It is important to note that this project is the product of extensive consultations with senior officials of the CARICOM Secretariat, the U.S. Permanent Mission to the OAS, the Bureau of Energy Resources of the U.S. Department of State, USAID, World Bank, CDB, IDB, and GIZ.

II. OBJECTIVE

The objective of the Consultancy is to evaluate the efficiency, effectiveness and sustainability of the C-SERMS project. The evaluation will specifically focus on the delivery of the main Outputs, and the Immediate and Intermediate Outcomes for the project.

A. Scope of the evaluation:

To achieve the objective the Consultant shall:

- i) Conduct a formative and summative evaluation, as it is necessary, in order to identify the main achievements and results of the project.
- ii) Conduct a Cost - Benefit Analysis of the project, by identifying the social and economic costs and benefits of the project, and trying to determine the returns to the investment, if any.
- iii) Determine the relevance of the project vis a vis the OAS mandates and priorities in the countries benefited by the interventions.
- iv) Determine the efficiency and effectiveness of the project as best reflected in the available results.
- v) Critically analyze the formulation, design, implementation and management of the project and make recommendations as needed.
- vi) Assess the institutional and financial sustainability of the interventions financed by the project.
- vii) Document lessons learned related to the formulation, design, implementation, management and sustainability.
- viii) Make recommendations, as appropriate, to improve the formulation, design and implementation for future similar interventions.
- ix) Assess if and how the project addressed the crosscutting issue of gender perspective and to what results.

In addition to the above, the consultancy will make every attempt to answer the following performance questions:

- Was the project's implicit Theory of Change supported by empirical evidence and was it effective?
- Were the project's objectives achieved and can attribution be established? More specifically, how much of the Caribbean Sustainable Energy Roadmap and Strategy (C-SERMS) has been achieved due to the project efforts?
- Did the outcome indicators identified the appropriate measurement of success?

- Are the project's achievements sustainable, institutionally and financially?
- Was the project cost efficient?
- Are the project's indicators S.M.A.R.T.
- Did the project team applied results-based management principles from its inception to its conclusion?
- Were best practices considered during the design and applied during the implementation?
- Was the monitoring mechanism used as an efficient and effective tool to follow-up on the progress of project's actions?

B. Information of Sources:

Among other sources the consultant will review the following:

- i) Project profile.
- ii) Progress implementation reports.
- iii) Completion report.
- iv) Project indicators identified in the logical framework.
- v) Products derived from the implementation of the project and means of verification.
- vi) Any other document deemed relevant for the completion of the work.

C. Relevant Stakeholders

Among other stakeholders the consultant will consider the following:

- i) Project Team.
- ii) Participating member states.
- iii) National and international counterparts.
- iv) Donors.
- v) U.S. State Department.
- vi) Department of Planning and Evaluation, OAS.
- vii) Department of Sustainable Development, OAS.
- viii) Inter-American Competitiveness Network (RIAC).
- ix) Beneficiaries.

III. ACTIVITIES:

This consultancy will be coordinated and supervised by the Department of Planning and Evaluation (DPE).

The evaluation process will take a participatory approach and take account of the views of all key stakeholders. In general, the evaluation will be based on interviews, analysis of documents, field visits, hard data, use of relevant evaluation instruments (i.e. application of surveys, focus groups, etc.) and all available data sources, as required.

Phase I: Preparatory activities.

To achieve the objectives of the Terms of Reference, the consultancy shall carry out the following activities, without prejudice to other tasks that are necessary to complete the work:

- i) Conduct an inception mission to OAS headquarters to meet with key stakeholders, assess more accurately the scope of the work and request the necessary information to perform effectively. As a result, the consultancy will submit a work plan to the OAS. The work plan will include the description and chronology of the activities to be carried out, the reports to be submitted and the deliverables of the evaluation.
- ii) Develop an Evaluation Framework (EF) which will contribute to determine if the project was implemented efficiently and effectively and generated the expected results. The EF shall include the following sections among other:
 - (a) A description of the methodology or design of evaluation strategy; data collection strategy; and the evaluation matrix. The evaluation methodology must consider qualitative and quantitative measurements.
 - (b) Data collection protocols and analysis of information.
 - (c) The instruments for the collection of information and related materials.
 - (d) The identification and measurement of output and outcome indicators (initial, intermediate and final) to measure the project's efficiency and effectiveness, in addition to those previously identified during the design of the project (refer to logical framework), if any. Both groups of indicators are expected to include their definition and methodologies for the collection and calculation.
 - (e) A field visit to CARICOM Secretariat should be included with a justification in the inception report. The visit will be discussed and agreed upon with the project team and the DPE.
 - (f) The updated work plan for the consultancy, including the collection, analysis and production of reports.
 - (g) A proposal to conduct a Cost – Benefit Analysis of the project (including methodology).
 - (h) A proposal of the table of contents of the final report, among others.

Phase II: Collection and analysis of information, and Midterm Report.

- iii) Review all the relevant documentation including those produced during the formulation and design of the project.

- iv) Conduct interviews and collect information from key stakeholders, including: Project Team (in Washington DC), US Mission officials; government officials, and direct and indirect beneficiaries, among other (see paragraph, relevant stakeholders).
- v) Conduct interviews and focus groups to validate the implicit chain of results (Logic Model) for the project, by determining if it was adequate and valid for the expected and actual results.
- vi) Establish the project's efficiency and effectiveness, identifying lessons learned and making recommendations for future executions. This assessment should include a cost-benefit analysis of the project to determine the economic feasibility of the proposed model of intervention. Literature should be used to support such feasibility.
- vii) Assess the management of the project in the use of planning and implementation tools, such as annual operations plans, logical framework, and project monitoring reports among others.
- viii) Assess the technical and economic feasibility of the project, including the sustainability of its benefits.
- ix) Determine the relevance of the criteria used for the targeting of beneficiaries; including teachers, students and member states benefiting from the project and make appropriate recommendations for similar initiatives in the future.
- x) Analyze how and if the project incorporated a gender perspective approach in the execution of its components, and if there were any such efforts, determine how consequential it was.
- xi) Measure the project's performance in terms of efficiency and effectiveness. The consultancy shall review and suggest adjustments to the indicators identified in the Logical Framework. In addition, the consultancy shall identify, propose and measure indicators that were not considered in the design. The consultancy shall analyze the extent to which the expected results were achieved as well as identify unplanned results that may have occurred.
- xii) Conduct electronic surveys of beneficiaries and counterparts as needed.
- xiii) Produce a midterm report describing the progress of the evaluation and the findings to date. The report will be accompanied by a Power Point presentation.
- xiv) Participate in a videoconference with OAS headquarters to present the midterm report.

A. Phase III: Presentation of final report.

- xv) Produce a final report analyzing and describing the execution, outputs and outcomes of the supported actions; lessons learned, recommendations and conclusions; a section for sustainability and beneficiaries, among others. Include a matrix to explain the progress for each output and outcome indicator. The report will be accompanied by a Power Point presentation.
- xvi) Conduct ***one mission to OAS headquarters*** to present the final report.

- xvii) The consultant will conduct a total of four missions, two to Washington DC, for the inception report and final report; and one mission to two other countries. The selection of the beneficiary countries will be discussed and agreed upon during the inception mission.

IV. PRODUCTS AND DELIVERABLES

The consultancy will produce and deliver the following documents taking into consideration each of the activities described in the above sections:

- i) A detailed work plan and the evaluation Framework **within 15 days** of signing the contract.
- ii) An inception report / evaluation framework, including an updated work plan on a previously agreed date.
- iii) A midterm report on the progress of the consultancy including, a revised Logical Framework, the theory of change and a Power Point to be presented on a previously agreed date.
- iv) Final Evaluation Report including a Cost - Benefit Analysis, all products mentioned above and a Power Point Presentation to be presented in OAS headquarters on a previously agreed date.

V. TIMEFRAME & PAYMENT SCHEDULE

It is expected that the consultancy will require a total of 40 non-consecutive working days between March and August 2019.

The payment schedule is as follows:

- 15% Upon signing the contract.
- 20% Upon delivery of an inception report.
- 30% Upon delivery of a midterm report accompanied by a Power Point presentation.
- 35% Upon delivery of the Final Evaluation Report accompanied by a Power Point presentation

VI. PROCUREMENT PROCESS

The contracting will follow the procurement processes outlined by OAS tender regulations, as well as Executive Order 05-04 Corr.1., ensuring the application of competitiveness and transparency principles.

Consultants interested in participating in the selection process should send the expression of interest and CV ***no later than April 16***, to Jacqueline Cook at jcook@oas.org