



**GENERAL SECRETARIAT OF THE ORGANIZATION OF AMERICAN STATES  
STRATEGIC COUNSEL FOR ORGANIZATIONAL DEVELOPMENT AND MANAGEMENT FOR RESULTS  
DEPARTMENT OF PLANNING AND EVALUATION**

**Call for Resumes:**

**“External Evaluation Consultant of the Project: Enhancing the Framework for the Development of a Heritage Economy in the Caribbean – Phase III”**

**Type of Appointment:** Individual consultancy

**Organizational Unit:** Department of Planning and Evaluation

**Duration:** approximately 4 months (35 non-consecutive days, see paragraph 5.1).

**Consulting Fee:** based on experience, education and skills

**Duty Station:** Washington DC, Member Countries and consultant’s place of residence

**Deadline:** no later than *January 20th, 2020* to Jacqueline Cook at [jcook@oas.org](mailto:jcook@oas.org)

**Profile:** The consultant must demonstrate a minimum of 10 years of experience in project evaluation and must hold a graduate degree in public policy, economics, evaluation, social sciences and 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 language, oral and written. Experience in the Culture sector, in working with an international organization in the Americas, and in the evaluation of similar projects are not a requirement but will be a plus.

**I. BACKGROUND:**

- 1.1 At the request of the US Permanent Mission the Department of Planning and Evaluation (DPE) is coordinating an external assessment of the Project “Enhancing the Framework for the Development of a Heritage Economy in the Caribbean” (EFDHEC). This assessment is part of the DPE’s 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 10 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. EFDHEC is a project that currently is being coordinated by the Culture and Tourism Section of the OAS (DED/SEDI/OAS).
- 1.2 Phases I and II of the program have had the same goal of contributing to expanding the socio-economic benefits of regional Cultural Heritage as valuable, non-renewable public resources through a new paradigm of public engagement. The objectives of Phase I (SID-1213) and II (SID1403) of “Expanding the Socio-Economic Potential of Cultural Heritage in the Caribbean” were to identify key

regional stakeholders and gain their input to inform an inter-sectoral strategy for promoting the protection and development of regional Cultural Heritage resources by governmental institutions, the private sector, and Civil Society, and to strengthen the capacity of participating Caribbean countries in the preservation, development, and use of Cultural Heritage resources with local community participation in the following aspects: legislation and fiscal policy, monitoring, planning and evaluation, sustainable Tourism, and Education and professional development, respectively

1.3 Phase III of EFDHEC, is a continuation of the projects above. The rationale for this Phase stems from the acknowledgement of OAS Member States of the Caribbean that there is a need to diversify their vulnerable national economies, and to explore the development of non-traditional areas. This is critical, since over the years the majority of the Caribbean countries have come to rely heavily on the Tourism industry, to the extent that Tourism is now one of the region's main economic drivers. The 2017 World Travel and Tourism Council report on the economic impact of Tourism in the Caribbean shows that the region presently ranks first among world regions for the direct contribution of Travel and Tourism to GDP (15.2%). However, it ranks 8th out of 13 world regions for projected growth in the next decade, 9th out of 13 for projected contribution to regional employment, and 10th out of 13 for projected contribution to capital investment (p. 10). Furthermore, Tourism leakage remains a major problem for the growth of local economies with 50-90% of money spent by tourists escaping national economies and ultimately the region. (See E.C. Harvey, "Strategic Plan for Regional Development" 2010, CARICOM).

1.4 It is clear therefore, that in the coming years the region must explore the development of niche markets to counteract growing international competition and combat the leakage of Tourism revenues. The growing niches of Cultural and Heritage Tourism are promising areas for investment and growth, as they help destinations to distinguish themselves in a crowded marketplace while at the same time providing opportunities for local entrepreneurs to market their authentic cultural assets and contribute to local economies.

#### **EFDHEC**

1.5 The EFDHEC is currently being executed with a budget of over US\$1.9 million (including in-kind contributions), Phase III of the program aims at strengthening human and institutional capacity of participating Member States, with local community participation, in promoting their Cultural Heritage as a viable economic resource.

1.6 The Project has focused on the following areas of development:

- Strengthening the institutional capacity of the Caribbean Heritage Network, offering training on ways to optimize its use as a medium through which Heritage professionals, communities, and organizations can support each other by combining and utilizing their particular skills and resources in complementary ways, and as a tool for the promotion and marketing of Heritage resources;
- Increasing awareness of the critical importance of protecting the region's Cultural Heritage;
- Strengthening the capacity of beneficiary countries (Barbados and Jamaica) to promote their Heritage places as viable economic resources, through the introduction of an efficient system of documentation of these places, as well as training on good practices in the marketing and promotion of the Heritage places;
- Strengthening the capacity of beneficiary countries (Guyana, Jamaica and Saint Lucia) to enhance the development of Sustainable Heritage Tourism through the establishment of a Sustainable Heritage

Tourism Endorsement Program to support and promote products and services which are authentic representations of the countries' Cultural Heritage;

- Providing online courses in Heritage to fill existing gaps in regional education curricula; and
- Promoting and including community engagement in all aspects of the development and promotion of Heritage.

## **PREVIOUS EXTERNAL EVALUATIONS**

- 1.7 In 2017, the DPE coordinated the external evaluation of Phase II of the project. At the time, it was concluded that the project was at a critical stage and it was recommended a revision of the project design and Budget component by component. The complete Report can be accessed here: [http://www.oas.org/en/saf/accountability/docs/Cultural\\_Heritage\\_Revised\\_Final.pdf](http://www.oas.org/en/saf/accountability/docs/Cultural_Heritage_Revised_Final.pdf)
- 1.8 Likewise, Phase III was subject to a formative evaluation in 2019, mainly to assess the progress and performance of the project. Overall, findings and prospects were mixed in terms of efficiency, effectiveness and sustainability. The complete Report can be accessed here: [http://www.oas.org/en/saf/accountability/docs/Final\\_OAS\\_MTE\\_Report\\_Sept.pdf](http://www.oas.org/en/saf/accountability/docs/Final_OAS_MTE_Report_Sept.pdf)

## **II. OBJECTIVE OF THE CONSULTANCY:**

- 2.1 The objective of the external evaluation is two-fold: i) to assess the performance of "Enhancing the Framework for the Development of a Heritage Economy in the Caribbean" (Phase III) in the beneficiary countries in the context of Phases I and II, by reviewing its advances to date and comparing them to those established in the Project objectives.; and ii) to determine to what extent the recommendations and lessons learned from the evaluation of Phase II and the formative evaluation report were taken into account in the design and conclusions of Phase III.

### **A. Scope of the evaluation.**

- 2.2 The evaluation will measure the achievements to date of Phase III of the EFDHEC. To achieve the objective the Consultant shall:
- i) Conduct a summative evaluation in order to assess the Project's performance in achieving its objectives.
  - ii) Conduct a cost-benefit analysis of the project, by identifying social and economic costs and benefits of the project, and analyze relevant literature and comparable projects.
  - iii) Determine the relevance of the Project per the OAS mandates and the priorities of the countries benefitting from the interventions.
  - iv) Make recommendations for future similar projects based on the evaluation's findings.
  - v) Determine, to the extent possible, the efficiency and effectiveness of the Project as best reflected in the available results to date.
  - vi) Critically analyze the formulation, design, implementation and management of the Project and make recommendations as needed.

- vii) Assess the institutional and financial sustainability of the interventions financed by the Project.
- viii) Document lessons learned related to the formulation, design, implementation, management and sustainability.
- ix) Make recommendations, as appropriate, to improve the formulation, design and implementation for future similar interventions.
- x) Assess if and how the project addressed the crosscutting issue of gender perspective and with what results.

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

- i) Were the outcome indicators achieved?
- ii) Were results achieved attributable to the actions of the operation?
- iii) Was the Project's implicit Theory of Change valid?
- iv) Are the outcome indicators the appropriate measurement of success?
- v) Are the Project's indicators S.M.A.R.T.?
- vi) Did the Project team apply results-based management principles from its inception to date?
- vii) Was the process for the selection of beneficiaries done based on pre-established criteria, and were the criteria appropriate?
- viii) Were best practices and recommendations from the previous evaluation taken into account during the design and applied during the implementation, and if not why?
- ix) Were lessons learned from Phases I and II taken into account during the design and applied during the implementation of Phase III, and if not why?
- x) Was the monitoring mechanism used as an efficient and effective tool to follow-up on the progress of Project's actions?

**B. Information sources.**

2.4 Among other sources the consultant will review the following:

- i) Project document.
- ii) Progress implementation reports.
- iii) Logical Framework Matrix.
- iv) Products derived from the implementation of the Project and means of verification.
- v) Mid-term evaluation report.
- vi) Any other document deemed relevant for the completion of the work.

**C. Stakeholders.**

2.5 Among other stakeholders the consultant will consider the following:

- i) Project Team.

- ii) Beneficiary countries.
- iii) Local and national counterparts.
- iv) Donors.
- v) Department of Planning and Evaluation, OAS.
- vi) Beneficiaries, individual in member countries

### **III. ACTIVITIES**

- 3.1 This consultancy will be coordinated and supervised by the Department of Planning and Evaluation (DPE), and shall perform the following activities, without prejudice to other tasks that are necessary to complete the work:
- 3.2 The consultant shall work in close collaboration with the Culture and Tourism Section (DED), who will in turn designate a member of its staff to facilitate the evaluation process. The evaluation process will take a participatory approach and take into account 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. In addition, the consultancy shall:
- 3.3 Develop a brief work plan and evaluation framework for the consultancy, including the description of the activities to be performed and the products as well as the order and focus of each.
- 3.4 Review key documents, relevant to the design and execution of the Project, among them: the Project proposal, Logical Framework, progress reports, and financial documents, among others.
- 3.5 Conduct interviews and collect information from key stakeholders, including: project team members, U.S. Mission officials, government officials, and direct and indirect beneficiaries, among others.
- 3.6 Conduct a field visit to a beneficiary country. This visit will be discussed and agreed upon with the project team and the DPE.
- 3.7 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.
- 3.8 Establish and document the Project's efficiency and identify lessons learned and recommendations for the ongoing and future executions.
- 3.9 Assess the management of the Project to date in the use of planning and implementation tools, such as the annual operations plan, logical framework, and Project monitoring reports among others.
- 3.10 Determine the relevance of the criteria used for the targeting of beneficiaries and make appropriate recommendations for similar initiatives in the future.
- 3.11 Analyze how and if the Project incorporated a gender perspective approach in the design and execution of its components, and if there were any such efforts, determine how consequential it was.
- 3.12 Review and suggest adjustments to the indicators identified in the Logical Framework, identify and propose and measure indicators that were not considered in the design but are relevant to determine the effects of the operation.

- 3.13 Determine whether lessons learned and recommendations drawn from the evaluation of Phase II and the mid-term evaluation of Phase III were taken into account during the design and applied during the implementation of Phase III.
- 3.14 Produce a midterm report describing the progress of the final evaluation and the findings to date. The report will be accompanied by a Power Point presentation. Participate in a videoconference with OAS headquarters to present the report.
- 3.15 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. The report will be accompanied by a Power Point presentation.

#### **IV. PRODUCTS AND DELIVERABLES**

- 4.1 The consultancy will produce and deliver the following documents taking into consideration each of the activities described in the above section:
- i) A detailed work plan and the evaluation Framework within 15 days of signing the contract.
  - ii) A mid-term report on the progress of the consultancy including the Theory of Change and a Power Point to be presented on a previously agreed date.
  - iii) Final Evaluation Report including all products mentioned above and a Power Point Presentation to be presented at OAS headquarters on a previously agreed date.

#### **V. TIMEFRAME & PAYMENT SCHEDULE**

- 5.1 It is expected that the consultancy will require a total of 35 non-consecutive working days between February and May 2019.
- 5.2 The payment schedule is as follows:
- 20% Upon signing the contract.
  - 40% Upon delivery of a midterm report accompanied by a Power Point presentation.
  - 40% Upon delivery of the Final Evaluation Report accompanied by a Power Point presentation.

#### **VI. PROCUREMENT PROCESS**

- 6.1 The contracting will follow the procurement processes outlined by OAS tender regulations, ensuring the application of competitiveness and transparency principles.
- 6.2 Consultants interested in participating in the selection process should send the expression of interest and CV *no later than January 20<sup>th</sup>, 2020* to Jacqueline Cook at [jcook@oas.org](mailto:jcook@oas.org).