



CARIBBEAN POLICY DEVELOPMENT CENTRE

TERMS OF REFERENCE

CONSULTANCY TO FACILITATE AN NGO ONLINE TRAINING WORKSHOP

I. BACKGROUND

The Caribbean Policy Development Centre is a legally registered non-profit headquartered in Barbados and established in 1991. CPDC serves as a regional umbrella NGO for organisations comprising of small farmers, women, youth, Indigenous People, rural populations and faith-based organisations located across CARICOM. CPDC also has strong networking partnerships with organisations of persons with disabilities, artisans, micro-entrepreneurs, human rights, and workers. Altogether it serves some thirty-three (33) regional, sub-regional and national (local) NGOs working at the grassroots level in economic, social, and cultural areas in the Caribbean. The Centre also has working relationships with many other NGOs and development partners across the region.

The organisation was mandated to work with NGOs and civil society to understand how policies affecting Caribbean people are made; to share information about policies and decision-making processes; to work to influence and bring change to the developmental process, and to support and to lobby for policies which improve the lives of Caribbean people. In fulfilling its mandate, the CPDC seeks to build the confidence and the ability of the Caribbean peoples to influence public policy. Our main work modalities are research, training, advocacy, publications, public education, and institutional strengthening. CPDC is officially recognised, both regionally and internationally, as the principal representative of Caribbean NGOs working with CARICOM/CARIFORUM, Commonwealth Foundation, and UN System Agencies.

In partnership with the European Union, the Caribbean Policy Development Centre is undertaking a joint 2-year grant partnership from March 2021 – June 2023. The project covers seven CARICOM countries: Antigua and Barbuda, Barbados, Dominica, Grenada, Saint Lucia, Saint Kitts and Nevis, Saint Vincent, and Grenadines. The project will build the Non-Governmental Sector's capacity in the Caribbean by implementing a number of specific actions. These actions focus on strengthening NGOs' capacity to provide key development solutions to vulnerable groups affected by the COVID-19 pandemic. In addition, these actions include activities that promote NGO's institutional and organisational capabilities through a number of core thematic areas:- addressing the legislative environment through advocacy programming, promoting greater transparency within the sector, project management skills development, enhanced regional policy dialogue and improving access to small grants to name a few.

The project European Union/CPDC partnership comes against a background of “the multidimensional impact of the COVID-19 pandemic on marginalised social sectors, requiring development support, critical CSO interventions to achieve sustainable development. However, the meaningful participation of CARICOM civil society has been stymied by two



main factors; the lack of capacity to effectively engage in the COVID-19 policy process and the lack of an institutionalised mechanism to facilitate dialogue between civil society and CARICOM governments. This action is therefore intended to implement activities to address these challenges.

II. PURPOSE AND OBJECTIVE

CPDC is seeking to procure the services of a qualified consultant to develop and facilitate an online capacity building course for NGO personnel in the region. The purpose of the course is to improve the financial literacy and management skills of NGO representatives to contribute to the long-term sustainability of civil society organizations. The consultant will serve as an external contractor, functioning in the role of facilitator of the programme. In this context, the required services will include the formulation, delivery, and certification of an Online NGO Financial Training Course.

General Objective

- To improve the financial management skills of NGOs in Barbados and the Eastern Caribbean through the facilitation of an online training course designed to build the capacity of the sector to execute impactful results-based projects and effectively represent their constituents.

Specific Objectives

1. To formulate and develop a financial management curriculum for a 10-session online training course to build the capacity of NGOs in the region. The curriculum should focus on the following topics:
 - a. Bookkeeping for NGOs
 - b. Understanding Financial Statements
 - c. Interpreting Financial Statements
 - d. Preparing Financial Statements
 - e. Budgeting for NGOs
2. To assess the capacity of NGOs pre and post training, presenting the results in a course evaluation report inclusive of recommendations for future programmes.
3. To develop training materials from the abovementioned training curriculum for online publication by CPDC.

I. PROFILE / CONSULTANCY REQUIREMENTS

The Consultant/s is expected to have the following specialised knowledge/experience required to complete the task:

A. Organisational Experience

1. At least 10 years proven experience in the formulation, delivery of training programmes.



2. At least five years' experience delivering financial management training or work in a related field
3. Demonstrated experience working with NGOs or delivering training that can positively impact on their institutional capacity at the national and/or regional level.
4. Demonstrated track record in coordinating educational training programmes.
5. History of relevant work in or on the Caribbean region.
6. Proven infrastructural capacity to deliver online training programmes regionally.

B. Skills and Competencies

- Proven Track record in the delivery of training programmes on time and within the certification criteria.
- Possess the skills and professional services to deliver training programme.
- Excellent skills in facilitation and coordination of training actions with students in dispersed geographic locations.
- Evidence of having undertaken similar assignments delivering professional qualifications.

II. DURATION OF THE ASSIGNMENT

The consultancy will run from 7th April – 19th May 2023.

III. DELIVERABLES

The consultant is expected to produce a slideshow presentation and policy brief based on the below timelines:

- Development of Training Materials for online dissemination by 7th April 2023
- Delivery of Capacity Building Work from 13th – 12th April 2023
- Post Workshop Report on Activities by 19th April 2023

V. ADMINISTRATION

The Consultant shall report to the CPDC Officer in Charge or his designate.

VI. INTELLECTUAL PROPERTY

All information pertaining to this consultancy shall remain the property of the CPDC who shall have exclusive rights over their use. The information shall not be disclosed to the public nor used in whatever form without written permission from the CPDC.

VII. GUIDELINES FOR APPLICATIONS

Interested persons are requested to submit the following in an expression of interest:

- A cover letter to the attention of the Officer in Charge, Caribbean Policy Development Centre;



- A Curriculum Vitae showing evidence of the applicant's history and delivery of similar programmes with relevant examples of work; and
- A Detailed Financial proposal outlining the costs broken down by days/tasks against proposed outputs should be submitted,

Submissions are to be sent to the Caribbean Policy Development Centre via electronic mail - cpdcsubmissions@gmail.com with subject line: **Consultancy to Coordinate and Facilitate a Professional NGO Financial Management Workshop**

All applications must be submitted by **5:00pm (UTC/GMT -4) on Monday 27th March 2023.**

CPDC will only respond to the successful applicant(s). Only persons meeting the criteria as outlined in Terms of Reference should apply.