

**TERMS OF REFERENCE:  
FACILITATOR FOR TRAINING OF CARIBBEAN RESULTS BASED MANAGEMENT (RBM)  
INSTRUCTORS**

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**1.0 INTRODUCTION**

The Enhanced CDM Strategy 2007-2012 follows a Results Based Management (RBM) and Programme Based Approach (PBA) to maximize synergies, coordination and harmonization, governance, monitoring, and evaluation.

The Enhanced CDM Strategy is designed to catalyze a PBA to disaster risk management programming in the region because such an approach facilitates regional engagement in development cooperation, based on the principle of coordinated support for a locally owned program of development. The approach includes four key elements, (i) leadership by the host country or organization, (ii) a single program and budget framework, (iii) donor coordination and harmonization of procedures and (iv) efforts to increase the use of local procedures over time with regard to program design and implementation, financial management, and monitoring and evaluation.

A PBA will bring major changes in bilateral arrangements for aid for the achievement of the outcomes and outputs level results enshrined in the Enhanced CDM Strategy. Therefore, this harmonized approach to development programming will foster modifications in how aid is planned, managed and reported both at the national and regional levels.

The results-oriented focus of the Enhanced CDM Strategy has facilitated the programme being a catalyst for donor harmonization and CDEMA's efforts to move towards an overarching CDM regional program. Through the programme, increased ownership and sustainability of initiatives will be achieved. It is expected that this intervention will result in better coordinated programming and stimulate national and regional championing of risk management amongst stakeholders and development planning.

CDEMA PS have been encouraged and supported in developing results-based Country Work Programmes (CWP) and Programme Monitoring Frameworks (PMF). These CWP and PMF are linked to the CDM Strategy, thereby facilitating on-going monitoring of and reporting on progress of achievement of national CDM results/priorities and regional CDM Strategy results.

There has been initial RBM approach exposure for National Disaster Offices (NDO) through regional workshops; however this was limited to a few persons in each NDO. There has also been initial exposure for national disaster organizations through national level RBM workshops.

The main challenge with the RBM training to date has been that it was of an introductory nature and lacking in ability to develop the level of competencies required for continuous support and further training at the national and sectoral level.

There exists therefore a group of persons that can be developed into a regional pool of *experienced* RBM instructors. Further training would enhance their soundness in the principles of RBM and confidence in delivery of instruction, and enhance the quality of regional RBM capacity. Training other persons, as yet unexposed to RBM or external to the CDEMA system, would also enhance this potential regional pool of expertise and ensure sustainability of the initiative.

This regional expertise would be available to PS to draw on this as needed (horizontal cooperation). The needs for such persons would be several, including better monitoring of CWP, support for ongoing development/upgrading of Country Work Programmes and RBM training in PS.

## **2.0 PURPOSE OF THE WORKSHOP**

The purpose of the workshop is to prepare instructors to teach skills for sustained use of the RBM approach for programming within the CDEMA system by:

- i. Gaining/enhancing familiarity with and understanding of the major concepts and skills that should be taught in the delivery of RBM training to national and regional CDM stakeholders.
- ii. Identifying the competencies for successful instruction of the RBM and Programme Based approaches for the development of programme management tools such as work programmes, monitoring frameworks, strategies, and proposals.
- iii. Practicing skills and coaching methods with real and simulated considerations.
- iv. Discovering ways to transfer and apply RBM principles and process (including the use of learning tools).
- v. Acquiring strategies for developing instructional materials to suit the programming requirements of national disaster management stakeholders.
- vi. Exploring guidelines for engaging special circumstances (e.g. dealing with resistance to using the new management approach or to attending ‘another’ training session).
- vii. Learning how to create connections between training in the RBM and PBA theories and the operations and programming needs of trainees.

## **3.0 OBJECTIVES OF THE CONSULTANCY AND OBJECTIVES OF THE CONSULTANCY**

3.1 The objectives of the consultancy are as follows:

- i. To train a cadre of regional RBM facilitators.

- ii. To develop effective training materials/tools for Caribbean RBM instructors.

3.2 Specifically the Consultant(s) is expected to develop and execute a training workshop for RBM Instructors. The Consultant is also expected to develop a package of training materials for participants.

3.3 The training workshop should meet the following minimum criteria:

- i. Produces instructors that are confident and competent in the delivery of training with minimal external support.
- ii. Engages Trainee Instructors in actual delivery of sections of the training.
- iii. Engages Trainee Instructors in simulating relevant and realistic challenges for practicing and applying the material.
- iv. Encourages Trainee Instructors to participate using:
  - a. Brief presentations
  - b. Live demonstrations
  - c. Innovative, interactive practical exercises with feedback and coaching on the relevant skills and processes, discussion exercises and application of reinforcement tools.
- v. Transfers techniques in best practice for the training of adult students to Trainee Instructors.
- vi. Provides each Trainee Instructor with his or her own set of instructor's training materials that should include but not be exclusive to the following:
  - a. An Instructor's Manual inclusive of guidelines for practical exercises/handouts. Accompanying the Instructor's Manual should be an Annex with a standard power point presentation, inclusive of notes for each slide.
  - b. A Participants' Resource Package, inclusive of training handouts that the Trainee Instructors can utilize to produce workshop materials for RBM workshops they will facilitate in the future.
- vii. Applies the RBM principles and techniques being taught, to developing and completing a CDM Country Work Programme for a CDEMA PS.

3.3 The participant Training Materials should meet the following minimum criteria:

- i. The Instructor's Manual should be published in an 8½" x 11", loose leaf binder. The Instructor's Manual should guide Trainee Instructors in teaching the RBM approach for effective use in programming within the CDEMA system. It should contain at a minimum the following sections:
  - a. Instructor Competencies- presents specific areas of competency for teaching RBM and describe how to achieve them.
  - b. Theory and Key Concepts- related to the RBM approach.

- c. Practical Considerations- guidelines and techniques for handling special training situations and training in professional development (instructing of the adult professionals).
  - d. Instructional templates- at least three detailed training templates for CDM mutli-year work programmes, performance measurements frameworks and the annual reporting format.
  - e. Practical exercises elaborated to assist the effective delivery of training and guidelines for developing practical exercises. The training will use an existing CWP and PMF of one CDEMA PS as the basis of the practical exercises as far as possible.
  - f. Processes for connecting the theory with the practical realities of the National Disaster Office, including operations, programming and management thereby making the training relevant and ensuring sustainable use (this may be linked into section 3.2 (vi)above).
  - g. Standardized power point presentation, inclusive of notes, which details the key concepts that should be included in introductory RBM training. The key concepts should include *inter alia*:
    - The results chain,
    - Reasons for and benefits of using RBM approach in the context of various stakeholder groups including donors,
    - Principles and steps for development of results
    - Principles and steps for development of performance measurement frameworks with a focus on indicator and target development,
    - Simple guidelines for reporting on achievement of planned results that are linked to the CDM country work programme reporting format,
    - Simple guidelines for defining assumptions, analyzing risks and developing risk mitigation strategies for country work programmes. This should be an Annex to the Instructor’s Manual and Guide.
  - h. Workshop evaluation templates that are gender sensitive.
- ii. The Participants’ Resource Package should include but not be limited to, a manual, workbook, tabletop exercises, resource information guide, templates and a basic power point presentation for refresher purposes. This manual is intended as a resource for Trainee Instructors when facilitating future training workshops to guide in developing material for their participants.

ICT, Gender and Climate Change are key cross-cutting themes of the Enhanced CDM Strategy 2007-2012. The Consultant is also expected to demonstrate that gender and climate change

considerations specifically have informed development of the workshop material and content. The importance of integrating climate change and gender mainstreaming issues into CDM programming should be incorporated in the training and workshop materials as best practices for Trainee Instructors.

#### **4.0 SCOPE OF WORK**

The Consultant(s) undertake(s) to perform the services with the highest standards of professional and ethical competence and integrity. The Consultant(s) is strongly encouraged to develop highly interactive and practical outputs for this consultancy.

The Consultant(s) is required to perform the following functions at minimum:

1. Review the relevant literature including, *inter alia*, the following:
  - a. The Enhanced CDM Strategy and Framework 2007-2012,
  - b. The CDEMA Country Work Programme and Performance Monitoring Framework Formats,
  - c. The CDEMA Country Work Programme Reporting Format,
  - d. The existing Country Work Programme and Performance Monitoring Framework of one (1) Participating State.
2. Collaborate with CDEMA CU/CDM HIP to develop and implement the training including:
  - a. Developing and finalising the agenda for the training based on number of days agreed and share for feedback.
  - b. Developing/elaborating the following:
    - i. The methodology/approach to the training;
    - ii. A set of workshop materials, as guided by Section 3, above. This set of materials should include an Instructor's Manual and Guide, the Participants' Resource Package and a standard power point presentation should be included. The power point presentation should be made available in an electronic form.
3. Facilitate the training based on the agreed agenda, training objectives and outputs.
4. Prepare a final report of the Consultancy that includes assessment of participant evaluations. The participant evaluations should review at a minimum the standard of instruction, practical exercises, and logistical arrangements. The workshop materials will be finalised after conclusion of the training workshop based on participants' observations and feedback and will be included in the final report.

## 5.0 RESULTS AND DELIVERABLES

The Consultant(s) will provide:

- i. An inception report which details the methodology/approaches and timelines associated with this consultancy and outlines a draft agenda for the training workshop. This report should demonstrate consideration of gender and climate change issues (see Section 3 above for guidance). To be submitted within two (2) weeks of signature of contract.
- ii. The final agreed agenda for the training and the full complement of workshop materials. To be submitted a minimum of five (5) weeks prior to convening the workshop.
- iii. The final report on the training including a thorough evaluation of the workshop. The analysis must include treatment of gender issues. To be submitted within two (2) weeks of the completion of the workshop.

## 6.0 LEVEL OF EFFORT

<b>Activity</b>	<b>Man Days</b>
i. Preparation of inception report	3
ii. Design of workshop and preparation of agenda and workshop materials	7
iii. Facilitation of workshop	5
iv. Preparation of final report based on comments received	2
<b>TOTAL</b>	<b>17</b>

Note: All other expenses are to be included in the financial proposal such as communications, travel and DSA costs for Consultant (s) (if applicable).

## 7.0 INPUTS OF THE CDEMA COORDINATING UNIT

The CDEMA CU will provide:

- i. The relevant literature as noted in Section 4;
- ii. Technical comments and feedback on the outputs of the Consultancy;
- iii. Logistical support for convening the training workshop, including invitations to participants and travel arrangements;
- iv. General oversight in the roll out of the consultancy.

## 8.0 CONSULTANT QUALIFICATIONS

- 8.1 A minimum of a postgraduate degree in a related area;
- 8.2 A minimum of 5 years experience in developing and facilitating training workshops, particularly training of instructors;
- 8.3 A minimum of 3 years experience in Results Based Management including programme development and execution and developing logical frameworks.
- 8.4 Examples of workshop materials previously developed;
- 8.5 Knowledge of disaster management issues and gender issues would be a distinct asset.

## 9.0 DURATION

Work is expected to start by **July 26, 2010 and conclude by October 15, 2010**. The workshop is expected to be held during the week of September 27 - October 1, 2010. The Consultant may be an individual or company and should be able to assume duties by **July 26, 2010**.

A technical and financial proposal based on the Terms of Reference outlined above must be provided by no later than close of business on **July 23, 2010**. The proposal must include full Curriculum Vitae for each member of the proposed team.

Further information may be obtained from **Ms. Gayle Drakes** ([gayle.drakes@cdema.org](mailto:gayle.drakes@cdema.org)) at the CDEMA Coordinating Unit (CU). Please send proposals to the address below:

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