

Terms of Reference

Expected starting date: 20 September 2021

Expected duration of assignment: 20 September 2021 – 15 December 2021

I. Background

UN Women, grounded in the vision of equality enshrined in the Charter of the United Nations, works for the elimination of discrimination against women and girls; the empowerment of women; and the achievement of equality between women and men as partners and beneficiaries of development, human rights, humanitarian action and peace and security. Through its programmes and projects, UN Women is providing technical assistance to national partners (governmental and non-governmental) in the implementation of existing international and national commitments to women's rights and gender equality, it facilitates networking and exchange of good practices and advocates for women's rights and gender equality in all areas of life.

Gender Responsive Budgeting (GRB) is an innovative public policy tool for assessing the impact of policies and budgets from gender perspective and for ensuring that policies and their accompanied budgets do not perpetuate gender inequalities but contribute to more equal society for women and men. GRB was formally introduced in Serbia by the adoption of the Budget System Law in 2015, when promotion of gender equality was identified as one of the budget goals (Article 4). New provisions of the above-mentioned Law introduced GRB as an obligation in the planning and execution of budgets, implying gradual introduction from 2016 to 2021. Additional amendments to the Budget System Law adopted in December 2016 further enhanced the GRB introduction, through introduction of obligatory reporting on impact of the budget programmes on improvement of gender equality as part of the Annual Budget Statement (Article 79). Furthermore, information on gender responsive objectives and indicators became integral part of programme information (Article 28, paragraph 6).

UN Women Office in Serbia continuously supports the process of GRB implementation and institutionalization at the national and provincial level, in cooperation with the Ministry of Finance, the Coordination Body for Gender Equality and the Provincial Secretariat of Finance. This resulted in inclusion of gender perspective in 2021 Budget of 68 budget users at national and provincial level, through 109 budget programmes and 315 objectives. However, more efforts need to be put towards GRB sustainability and institutionalization at all governmental levels. In line with this, UN Women has partnered with the National Academy for Public Administration (NAPA), and supported introduction of GRB curricula in its Programme, which is adopted by the Serbian Government in 2021.

In order to deepen the work previously done, launch new initiatives and ensure sustainability of the interventions on GRB, UN Women ECA Regional Office has initiated a regional programme with participation of Serbia "Transformative Financing for Gender Equality towards more Transparent, Inclusive and Accountable Governance in the Western Balkans" (2020-2024), which is financially supported by the Government of Sweden - SIDA. The main programme approach is transformative financing as an enabler factor for policy and financing actions to accelerate implementation of existing national and international commitments on gender equality and women's empowerment in the Western Balkans.

Besides working with relevant institutions in guiding and supporting them to apply GRB in future planning cycles, the programme envisages work with media, to enable better understanding of the impact of GRB on the life of all citizens. GRB has proven to be an important tool that can be used to demystify the budget and provide evidence to understand the figures and explain in simple terms the impact budgets have on the lives of women and men. GRB initiatives refer to a range of actions that

ultimately seek to make the budgeting process more responsive to the inequalities between women/girls and men/boys. These initiatives include, for example, carrying out gender budget analysis, increasing economic literacy and understanding the budgeting process, raising awareness, building knowledge and capacity on gender issues, improving transparency of the effects the budgeting process has on women and men, increasing government accountability, etc. In most of the cases it is hard for women and men to link their daily life as tax-payers with government budget and see how the government is spending the money and who benefits from it. On the other side, when media is reporting on economic themes, they rarely take into account different positions and needs of various groups in our society, and the influence of budgeting.

II. Objectives of the Assignment

With the aim of enhancing media reporting on the impact of financing on quality of daily lives of women and men and GRB, UN Women in Serbia will work with the media community in strengthening the capacities of media professionals on informed reporting on GRB and on strengthening the role of media in promotion of gender equality and women's empowerment.

UN Women seeks to engage a company to provide capacity building to media professionals in order to improve budget/GRB literacy and understanding of local decision-making processes by media professionals. The company should support the media with technical expertise on how to use GRB as a tool to assess the impact of government budget on women's lives. Additionally, in order to increase the project's visibility and raise awareness about the importance of gender responsive budgeting, the consultancy company will be required to identify human stories that can show the impact of the work done through GRB implementation.

The overall approach of this consultancy should aim to question budgets as gender neutral, include gender equality considerations during the trainings and generate knowledge and tools on gender issues and GRB practices, that will be used by media professionals (as detailed below).

III. Scope of Work

The Contractor will conduct a range of activities essential to enhancing media reporting on the impact of financing on quality of daily lives of women and men and GRB. To respond to the objective set in the ToR, the Contractor is expected to undertake the following tasks:

1. GRB capacity development of media professionals

The Contractor is expected to develop, organize and conduct trainings to sensitize media professionals on how GRB can impact women's lives and promote gender equality and women's empowerment, improve budget/gender equality/GRB literacy and understanding of decision-making processes by media professionals. This activity will take into consideration all the above to sensitize media professionals and to develop a better understanding of budget/gender equality/GRB within the media community.

The Contractor will be responsible for the following:

- provide a detailed timeline and training methodology for training session that will be repeated in 3 different regions across Serbia (Belgrade, South-East and South-West Serbia), taking into account:
 - i. each training session should last two days and gather at least 10 journalists per session;

- ii. define target groups and three different cities (Belgrade, South-East and South-West Serbia), ensuring gender balance and ensuring that participating journalists (at least 30 in total) are coming from different fields of specialization relevant for GRB (finance, politics, social issues, etc.) and from different regions in Serbia;
- iii. draft the agenda and objectives of the training and identify relevant topics to be covered during training session, to be discussed and finalized with UN Women. The content of the training should focus on providing clarity and understanding of the conceptual, technical and socio-political elements of gender equality and gender responsive budgeting, as well as basics of public finance management. The training should also focus on practical work in groups and pitching story ideas that will be developed further through mentoring after the training. In addition, the sessions should focus on sensitizing and awareness raising on GRB, public budgets, and how they impact on women's lives;
- iv. develop pre and post-assessment questionnaire to reflect the increase in knowledge on the above mentioned subjects;
- v. prepare background materials in Serbian (handouts/PPTs, GRB briefs, examples of good practice), and include a pre and post questionnaire to measure the result of the training;
- organize and deliver in-person training sessions in three identified cities, including necessary logistics (hotel accommodation for participants, transportation etc.). Develop a back-up plan and online training modality, in case of next wave of COVID-19 pandemic;
- provide a final report on training sessions in English (containing training methodology, description of target groups and list of participants, training objectives, topics addressed, results of the pre and post questionnaire).

2. Develop 6 human-interest stories which can show the impact of the work done through GRB implementation at the local or national level

The objective of this activity is to increase project's visibility and raise awareness about the importance of gender responsive budgeting by "making the unfamiliar familiar", namely by showing positive examples of how GRB is put into practice and what are the concrete effects of GRB on women's lives, with a focus on women from the most excluded groups in line with the Agenda 2030 overarching principle of 'Leave No One Behind'. Showcasing women's voices and the impact of GRB on the improvement of quality of women's lives can raise awareness about GRB as an empowering tool for gender equality and further inspire every person to actively participate and voice their needs.

The Contractor will be responsible for the following:

- develop a work plan that will detail the production of 6 stories. In particular:
 - i. identify 6 topics/story ideas under gender-responsive budgeting together with trainings' participants and trainer/s on training sessions, and in close consultation with UN Women team;
 - ii. provide mentorship to journalists in drafting 6 stories (i.e. to identify interviewees, support with background information, support in undertaking interviews...). Journalists are to have one month for drafting the story;
 - iii. present the selected story ideas to UN Women.
- produce 6 articles/texts about selected stories in an innovative and creative way taking into consideration the current situation on the ground and focusing on the work of UN Women in the area of GRB and how it impacts the lives of women;
- undertake a substantive editing of the first drafts, after receiving feedback from UN Women, to ensure internal consistency, both intellectual and stylistic; ensure in the editing process that simple, recognizable and clear words and phrases are used in all

stories, while jargon, abbreviations and in general more complex words and phrases are avoided;

- use understandable language and identify catchy titles;
- capture high quality digital photographs to portray women-beneficiaries and document best practices on GRB implementation and its impact on the improvement of women's position;
- ensure publishing 6 stories on popular national news portal/s;
- prepare final report on the assignment.

Note: In case of an outbreak of another wave of COVID-19 pandemic and epidemiological measures, the selected company will work with UN Women to revise and adjust the workplan and budget of the consultancy in line with the circumstances.

IV. Expected Results

- 3 in-person training sessions organised across the country or online, depending on the valid and latest COVID measures;
- At least 30 journalists from different fields of expertise learned about GRB and its impact on the lives of women and men and implement this new knowledge when reporting of finance and economic themes;
- 6 human impact stories showing the impact of GRB and UN Women's role in it published on national news portal/s.

V. DELIVERABLE SCHEDULE

No.	Task/Deliverable	Delivery date
(i)	Training	
	Detailed timeline and training methodology (in English)	25 September 2021
	Final report on training sessions (in English)	25 October 2021
(ii)	Human-Interest Stories	
	Workplan and timeline for production of stories, as defined above, submitted to and approved by UN Women (in English)	25 October 2021
	Report on mentorship provided to journalists in a period of one month (in English)	25 November 2021
	Six human-interest stories finalized and published with digital photographs, to be submitted and approved by UN Women (in English and in Serbian)	5 December 2021
	Final report on the overall assignment, submitted to and approved by UN Women (in English)	10 December 2021

VI. The Contractor Eligibility and Relevant Experience

The contractor engaged to undertake the assignment must fulfil the following minimum requirements:

- Legally registered entity in the Republic of Serbia (profit or not-for-profit entity), legally able to provide profit related services;
- Minimum 5 years in working with media in Serbia, preferably with a focus on human rights. Work on gender equality and/or budgets/institutions will be considered as an asset;
- Minimum 2 years of experience in conducting trainings and other capacity development events for media professionals for responsible reporting on issues related to human rights and/or gender equality.
- Previous experience working with UN Women and other UN Agencies/international organizations will be considered as an advantage.

VII. Team Composition/Qualification

The team composition is expected to include an overall national team leader and at least two additional national team members.

The team leader will be responsible for the deliverables and will coordinate the work of all other team members during all phases of the process, ensuring the quality of deliverables and application of methodology as well as timely delivery of all products.

The overall team Leader should have:

- Bachelor's degree in journalism, economics, gender studies, human rights or related humanities/social studies. MA degree in the same field will be considered as an advantage;
- Minimum 3 years of experience in managing projects related to working with media professionals;
- Previous experience in conducting trainings for media professionals would be considered as an advantage;
- Previous work experience working for international organizations and/or governmental programs concerning related field will be consider as an advantage;
- Demonstrated strong network or partnerships with media organizations and outlets, as well as journalists and editors, especially those in the field of economy and finances;
- Proficiency in written and spoken English and Serbian Language.

Project team members:

Lead trainer:

- A bachelor's degree in communications and media studies, journalism, or relevant field;
- Minimum 5 years of relevant work experience in the field of media and communications in Serbia;
- Minimum 2 years of experience in designing and conducting trainings for journalists and editors;
- Demonstrated experience and knowledge in working on the subjects of economy and public finance management and/or gender equality and human rights.

GRB trainer:

- BA degree (or equivalent) in Finance, Economics, International Development Studies, Social Sciences, Politics, Human Rights, Gender, Women Studies or related field;
- Minimum 3 years of relevant experience in the field of gender responsive budgeting, gender equality and women's empowerment;

- At least 2 years of experience in organizing and delivering capacity development events and trainings;
- Ability to work interactively with a team, often responding to numerous requests under pressure;
- Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders;
- Fluency in English and Serbian (written and oral).

VIII. Roles and Responsibilities of the Parties

UN Women will provide technical guidance where possible. The Contractor shall be required to bear all the related costs and work independently to successfully achieve the end results.

IX. Communication and Reporting Obligations

The Contractor will report to the GRB Programme Coordinator and will work under the overall supervision of the UN Women Gender Specialist. The contractor is also expected to inform UN Women of any unforeseen challenge or risk that might occur during the duration of the assignment.

Evaluation Criteria

Preliminary Examination Criteria

All criteria will be evaluated on a Pass/Fail basis and checked during Preliminary Examination.

Criteria	Documents to establish compliance
Completeness of the Proposal	All documents and technical documentation requested in Instructions to Vendor have been provided and are complete
Vendor accepts UN Women General Conditions of Contract	Proposal Submission Form (Online Form)
Proposal Validity	Proposal Submission Form (Online Form)
Excellent English and Serbian language skills both oral and written by the personnel	CV template
The contractor must be located in the Republic of Serbia	Confirmation of registration

Minimum Eligibility and Qualification Criteria

Minimum eligibility and qualification criteria will be evaluated on a Pass/Fail basis.

If the Proposal is submitted as a Joint Venture, Consortium or Association, each member should meet the minimum criteria, unless otherwise specified.

Eligibility Criteria	Documents to establish compliance
Vendor is a legally registered entity.	Proposer Information Form (Online Form)
Vendor is not suspended, nor otherwise identified as ineligible by any UN Organization, the World Bank Group or any other International Organisation in accordance with Instructions to Vendors.	Proposal Submission Form (Online Form)
No conflicts of interest in accordance with Instructions to Vendors.	Proposal Submission Form (Online Form)
The Vendor has not declared bankruptcy, in not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the vendor that could impair its operations in the foreseeable future	Proposal Submission Form (Online Form)

Qualification Criteria	Documents to establish compliance
History of non-performing contracts: Non-performance of a contract did not occur as a result of contractor default within the last 3 years.	Eligibility and Qualification Form (Online Form)
Litigation History: No consistent history of court/arbitral award decisions against the vendor for the last 3 years.	Eligibility and Qualification Form (Online Form)
Previous Experience:	
Minimum 5 years of relevant experience.	Eligibility and Qualification Form (Online Form) / Technical Proposal
Minimum 1 contracts of similar value, nature and complexity implemented over the last 3 years. (For JV/Consortium/Association, all Parties cumulatively should meet requirement).	Eligibility and Qualification Form (Online Form)
Financial Standing:	

Liquidity: the ratio Average current assets / Current liabilities over the last 3 years must be equal or greater than 1. Vendor must include in their Proposal audited balance sheets cover the last three years	Copy of audited financial statements for the last three years. / Eligibility and Qualification Form (Online Form)
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Technical Evaluation Criteria

Section 1. Vendor's qualification, capacity and experience		Points
1.1	<u>Reputation of organization and staff credibility / reliability</u> Offeror shall provide a brief description of the organization, including the year and country of incorporation, and types of activities undertaken	25
1.2	<u>General Organizational Capability</u> Offeror shall: a) Outline General Organizational Capability which is likely to affect implementation (i.e. management structure, financial stability and project financing capacity, size of the organization, strength of project management support e.g. project management controls, global networking, financial stability). b) Include a description of past and present experience and relationships that have a direct relationship to the performance of the TOR. Include relevant collaborative efforts the organization may have participated in. c) Explain whether any work would be subcontracted, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-contractors. Special attention should be given to providing a clear picture of the role of roles, responsibilities, reporting lines and accountability.	50
1.3	<u>Relevance of specialized knowledge and experience on similar engagements done in the region / country</u> Offeror shall: a) Provide information confirming relevance of: - Minimum 5-year experience in working with media in Serbia, preferably with a focus on human rights. Work on gender equality and/or budgets/institutions will be considered as an asset; - Minimum 2-year experience in conducting work on enhancing capacities of media professionals for responsible reporting on issues related to human rights and/or gender equality. b) Describe the experience of the organization performing similar services or works. Experience with another UN Women/UN organizations/ international organizations/ major multilateral or bilateral programmes is highly desirable. c) Provide at least 3 references with the following information: - Client - Contract value - Period of performance (from/to) - Role in relation to undertaking the goods/services/works - Reference Contact Details (Name, Phone, Email)	100
1.4	<u>Quality assurance procedures, risk and mitigation measures</u> Offeror shall describe the potential risks for the performance of the TOR that may impact achievement and timely completion of expected results as well as their quality. Describe measures that will be put in place to mitigate these risks.	25
Total Points for Section 1		200
Section 2. Proposed methodology approach and implementation plan		Points
2.1	<u>Analysis Approach, Methodology</u> Offeror shall: a) Provide in sufficient detail a description of the organization's approach and methodology for meeting or exceeding the requirements of the Terms of Reference; b) Explain the organization's understanding of UN Women's needs for the goods/services/works and how the different service elements shall be organized, controlled and delivered;	100

	<p>c) Describe the available performance monitoring and evaluation mechanisms and tools and how they shall be adopted and used for a specific requirement;</p> <p>d) Describe how your organization will adhere to UN Women's procurement principles in acquiring services on behalf of UN Women. UN Women's general procurement principles:</p> <ul style="list-style-type: none"> i) Best Value for money ii) Fairness, integrity and transparency iii) Effective competition iv) The best interests of UN Women 	
2.2	<p>Management - timeline, deliverables and reporting</p> <p>Offeror shall provide a detailed description of how the management for the requested goods/services/works will be implemented to achieve the requirements of the Terms of Reference. The activities in the implementation plan should be properly sequenced, logical and realistic.</p>	100
Total Points for Section 2		200
Section 3. Management Structure and Key Personnel		Points
3.1	<p><u>Composition of the team</u></p> <p>The offeror shall:</p> <ul style="list-style-type: none"> a) Describe the availability of resources in terms of personnel and facilities required for the Terms of Reference. b) Describe the structure of the proposed team/personnel, and the work tasks (including supervisory) which would be assigned to each. d) For each of the key personnel provide the CV using the format provided 	
	<p><u>The overall team Leader should have:</u></p> <ul style="list-style-type: none"> - Bachelor's degree in journalism, economics, gender studies, human rights or related humanities/ and social studies. MA degree in the same field will be considered as an advantage. - Minimum 3 years of experience in managing projects related to working with media professionals. - Previous experience in conducting trainings for media professionals would be considered as an advantage. - Previous work experience working for international organizations and/or governmental programs concerning related field will be consider as an advantage. - Demonstrated strong network or partnerships with media organizations and outlets, as well as journalists and editors, especially those in the field of economy and finances; - Proficiency in written and spoken English and Serbian Language. 	100
	<p><u>Lead trainer:</u></p> <ul style="list-style-type: none"> - A bachelor's degree in communications and media studies, journalism, or relevant field; - Minimum 5 years of relevant work experience in the field of media and communications in Serbia; - Minimum 2 years of experience in designing and conducting trainings for journalists and editors; - Demonstrated experience and knowledge in working on the subjects of economy and public finance management and/or gender equality and human rights. 	90
	<p><u>GRB trainer:</u></p> <ul style="list-style-type: none"> - BA degree (or equivalent) in Finance, Economics, International Development Studies, Social Sciences, Politics, Human Rights, Gender, Women Studies or related field; - Minimum 3 years of relevant experience in the field of gender responsive budgeting, gender equality and women's empowerment; - At least 2 years of experience in organizing and delivering capacity development events and trainings; - Ability to work interactively with a team, often responding to numerous requests under pressure; - Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders; - Fluency in English and Serbian (written and oral). 	90

3.2	<p><u>Gender Profile</u></p> <p>The offeror shall provide information on the gender profile of the organization:</p> <ul style="list-style-type: none"> - Women-owned Business status – whether the entity is owned, controlled or managed by at least 51% women; - Proportion of women in managerial position; - Policies in place that contribute to gender equality; - Commitment to the Women’s Empowerment Principles (www.weps.org/join) - if more than 10 employees; - Agreement to signing of the Voluntary Agreement to Promote Gender Equality and Women’s Empowerment in case of contract award - if less than 10 employees; <p>Good practices of gender-responsive companies can be found here: http://weprinciples.org/Site/CompaniesLeadingTheWay/</p>	20
Total Points for Section 3		300
TOTAL POINTS		700