

# Terms of Reference

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Expected starting date: 15 March 2022

Expected duration of assignment: 15 March 2022 – 15 December 2022

## 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 aims to close the "implementation gap" that exists in countries such as Serbia, which have laws and policies in place to advance gender equality, but these are not implemented in practice. By focusing on the most important tool the Government has at its disposal - the budget - GRB initiatives call for commitment not only on paper, but also in practice, and contribute to developing the capacities and knowledge needed to address gender gaps in sector and local government policies, plans and budgets.

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 2024. Additional amendments to the Budget System Law adopted in December 2016 further enhanced the GRB introduction, through incorporation of obligatory reporting on impact of the budget programmes on improvement of gender equality into 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 2022 Budget of 71 budget users at national and provincial level, through 104 budget programmes and 369 objectives. However, progress towards applying GRB in the entire process of planning, budgeting and reporting needs further strengthening and more efforts need to be put towards GRB sustainability and institutionalization at all governmental levels.

In order to deepen the previously done work, launch new initiatives and ensure sustainability of the interventions on GRB, UN Women initiated a regional programme "Transformative Financing for Gender Equality towards more Transparent, Inclusive and Accountable Governance in the Western Balkans" (2020-2024), in which Serbia is also participating. The main programme approach will involve around transformative financing as an enabling factor for policy and financing actions to accelerate implementation of existing national and international commitments on gender equality and women's

empowerment in the in Western Balkans. It envisages provision of tailored technical assistance and guidance, as well as building institutional capacity and knowledge at all governmental levels.

In 2022, UN Women will provide comprehensive GRB support to 10 local LSGUs, that were mapped through extensive research conducted in 2021 in partnership with the Coordination Body for Gender Equality. The selected LSGUs are Belgrade – Zvezdara LGSU, Arandjelovac, Cacak, Ljig, Kragujevac, Krusevac, Nis - Crveni Krst LGSU, Novi Knezevac, Razanj and Vladicin Han. The activities will strongly support LSGUs in applying GRB, improving delivery on national legal and policy commitments related to GE and effectively address the needs of women and girls' boys and men, with specific focus on socially excluded groups. Past proven approaches in conducting specific sectoral programme analysis and identifying gender responsive measures and indicators will be upscaled with focus on areas where both needs and opportunities are identified at the local level.

## **II. Objectives of the Assignment**

The objective of the assignment is to further support and strengthen the process of GRB implementation and institutionalization at local level. This is to be achieved through provision of expert support in gender mainstreaming through conducting of gender analysis; supporting organization of capacity development programmes for civil servants, including trainings and mentoring support dedicated to GRB implementation, monitoring and reporting. In addition, provision of support and recommendations for LGSU to be visited as part of the study visit focused on examples of good practice in GRB implementation at local level.

## **III. Scope of Work**

The Contractor will conduct a range of activities essential to the institutionalization of GRB at the local level in Serbia. To respond to the objective set in the ToR, the Contractor is expected to undertake the following tasks:

### **1. Support civil servants, local Gender Equality Mechanisms and councillors in 10 LSGUs in programme planning, budgeting and reporting through comprehensive training and mentoring programme**

The Contractor will be responsible for the delivery of trainings for civil servants employed in various departments in 10 selected LSGUs, as well as members of the LSGUs Local Gender Equality Mechanism and the local councillors (agenda development; preparation of training materials and proposing model for measuring change in participants' knowledge as a result of the training, reporting on trainings) and provision of individual mentoring support. The training curricula should be based on UN Women standardised GRB manual for local level, adapted to the Serbian context. The trainings should include sessions on programme budgeting as a tool to plan and monitor changes in the local communities, gender aspects of the LSGUs' competencies, and how to practically integrate gender budgeting in the programme budget structure, perform gender analysis, and report on GRB introduction, while mentoring support will be provided through provision of individual and tailored info sessions. The following trainings and info-sessions are envisioned:

- 4 two-day trainings on gender equality and GRB for civil servants from 10 LSGUs. The LSGUs should be grouped by districts;
- 4 two-days trainings on programme budgeting and GRB for members of local GEMs from 10 LSGUs. The LSGUs should be grouped by districts;

- 4 two-days trainings on GRB for councillors from 10 LSGUs. The LSGUs should be grouped by districts;
- 5 2-hour info sessions per each of 10 LSGUs.

## **2. Provide expert support to gender analyses of local policies and budgets, in line with request from the LSGUs**

The Contractor will be responsible for the following:

- To support development of 10 gender analysis of specific sector programmes and budgets (at least one per LSGU), in close cooperation with the LSGUs and in line with their requirements.

## **3. Support organization of GRB Study Visit to one of the LGSUs in Serbia, an example of good practice**

The Contractor will be responsible for the following:

- Propose 3 LSGUs in Serbia as examples of good practice in GRB implementation with short review of achieved GRB results in these municipalities;
- Develop agenda of the study visit to the selected LGSU.

## **IV. Expected Results**

- Civil servants employed in 10 LGSUs capacitated to introduce GRB in 2023 budgets and report on its impact;
- Training package used at GRB trainings for civil servants employed in 10 LSGUs, councillors and local GEMs developed and delivered to UN Women (containing agenda, training materials and other relevant documents/analysis);
- Local GEMs from 10 LSGUs capacitated to oversee the introduction of GRB in local budgets;
- Local councillors from 10 LSGUs capacitated to oversee and advocate for GRB introduction in local budgets for 2023;
- 10 gender analysis of sector programmes and budgets in 10 selected LSGUs produced;
- Selection of one LGSU in Serbia as an example of good GRB practice and developed agenda of study visit.

## **V. DELIVERABLE SCHEDULE**

<b>Deliverable</b>	<b>Timeframe</b>
Project Workplan with timeline and planned activities (in English)	25 March 2022
Developed 10 gender analysis of sector programmes and budgets in 10 selected LSGUs (in Serbian and in English)	30 May 2022
Comprehensive Report on GRB capacity development for local GEMs and Councillors in 10 LSGUs (in English). Report should include Value-Added Assessment (Pre- and Post-testing) about the impact of education.	30 June 2022
Organization of a study visit – recommendation of 3 examples of good GRB practice and draft agenda	30 July 2022
Comprehensive report on GRB support provided to civil servants employed in 10 LSGUs (in English), including training and mentoring. Report should include Value-Added Assessment (Pre- and Post-testing) about the impact of education.	30 November 2022

## **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;
- At least 3 years of experience in introduction of gender responsive budgeting and/or gender mainstreaming of policies, programmes and budgets, as well as experience in conducting training and providing mentoring support.

## **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:

- Master's degree (or equivalent) in International Development Studies, Social Sciences, Politics, Law, Human Rights, Gender, Women Studies, Economics, or related field.
- Minimum of 5 years of experience and expertise in gender equality and women's empowerment, gender mainstreaming, gender analysis.
- Minimum 3 years of relevant experience in GRB introduction.
- Experience in developing and delivering GRB training packages, preferably at local level.
- Experience in conducting gender analysis.
- Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders.
- Proficiency in written and spoken English and Serbian Language.

Project team members (two team members):

- BA degree (or equivalent) in International Development Studies, Social Sciences, Politics, Law, Human Rights, Gender, Women Studies, Economics or related field.
- Minimum 2 years of relevant experience in the field of gender responsive budgeting, gender equality and/or women's empowerment.
- Experience in organizing and delivering capacity development events.
- 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 Programme Management Specialist.

## 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
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 3 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 two 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	<b><u>Reputation of organization and staff credibility / reliability</u></b> Offeror shall provide a brief description of the organization, including the year and country of incorporation, and types of activities undertaken	25
1.2	<b><u>General Organizational Capability</u></b> 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	<b><u>Relevance of specialized knowledge and experience on similar engagements done in the region / country</u></b> Offeror shall: a) Provide information confirming relevance of: - Legally registered entity in the Republic of Serbia (profit or not-for-profit entity), legally able to provide profit related services; - At least 3 years of experience in introduction of gender responsive budgeting and/or gender mainstreaming of policies, programmes and budgets, as well as experience in conducting training and providing mentoring support. b) Describe the experience of the organization performing similar services or works. Experience with another UN 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	<b><u>Quality assurance procedures, risk and mitigation measures</u></b> 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
<b>Total Points for Section 1</b>		200
Section 2. Proposed methodology approach and implementation plan		Points
2.1	<b><u>Analysis Approach, Methodology</u></b> 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; c) Describe the available performance monitoring and evaluation mechanisms and tools and how they shall be adopted and used for a specific requirement;	100

2.2	<b>Management - timeline, deliverables and reporting</b> 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.	100
<b>Total Points for Section 2</b>		200
<b>Section 3. Management Structure and Key Personnel</b>		<b>Points</b>
3.1	<b>Composition of the team</b> The offeror shall: 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	
	<b>The overall team Leader should have:</b> <ul style="list-style-type: none"> <li>- Master's degree (or equivalent) in International Development Studies, Social Sciences, Politics, Law, Human Rights, Gender, Women Studies, Economics, or related field.</li> <li>- Minimum of 5 years of experience and expertise in gender equality and women's empowerment, gender mainstreaming, gender analysis.</li> <li>- Minimum 3 years of relevant experience in GRB introduction.</li> <li>- Experience in developing and delivering GRB training packages, preferably at local level.</li> <li>- Experience in conducting gender analysis.</li> <li>- Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders.</li> <li>- Proficiency in written and spoken English and Serbian Language.</li> </ul>	100
	<b>Team member 1:</b> <ul style="list-style-type: none"> <li>- BA degree (or equivalent) in International Development Studies, Social Sciences, Politics, Law, Human Rights, Gender, Women Studies, Economics or related field.</li> <li>- Minimum 2 years of relevant experience in the field of gender responsive budgeting, gender equality and/or women's empowerment.</li> <li>- Experience in organizing and delivering capacity development events.</li> <li>- Ability to work interactively with a team, often responding to numerous requests under pressure.</li> <li>- Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders.</li> <li>- Fluency in English and Serbian (written and oral).</li> </ul>	90
	<b>Team member 2:</b> <ul style="list-style-type: none"> <li>- BA degree (or equivalent) in International Development Studies, Social Sciences, Politics, Law, Human Rights, Gender, Women Studies, Economics or related field.</li> <li>- Minimum 2 years of relevant experience in the field of gender responsive budgeting, gender equality and/or women's empowerment.</li> <li>- Experience in organizing and delivering capacity development events.</li> <li>- Ability to work interactively with a team, often responding to numerous requests under pressure.</li> <li>- Excellent analytical, facilitation and communications skills and ability to negotiate amongst a wide range of stakeholders.</li> <li>- Fluency in English and Serbian (written and oral).</li> </ul>	90
3.2	<b>Gender Profile</b> The offeror shall provide information on the gender profile of the organization: <ul style="list-style-type: none"> <li>- <i>Women-owned Business status – whether the entity is owned, controlled or managed by at least 51% women;</i></li> <li>- <i>Proportion of women in managerial position;</i></li> <li>- <i>Policies in place that contribute to gender equality;</i></li> <li>- <i>Commitment to the Women's Empowerment Principles (<a href="http://www.weps.org/join">www.weps.org/join</a>) - if more than 10 employees;</i></li> </ul>	20

	- <i>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;</i> Good practices of gender-responsive companies can be found here: <a href="http://weprinciples.org/Site/CompaniesLeadingTheWay/">http://weprinciples.org/Site/CompaniesLeadingTheWay/</a>	
<b>Total Points</b> for Section 3		300
<b>TOTAL POINTS</b>		700