**UNICEF Lebanon Terms of reference (TOR) for LTA for National Institutions/Think-Tanks**

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| **PROJECT/ASSIGNMENT TITLE: Long Term Agreement for Policy Analysis and Advocacy Services to UNICEF Lebanon Country Office** |
| **WORKPLAN CODE NUMBER:**  ***Specific Intervention Code:*** Social Policy Rolling Work Plan  Evidence generated on budgets and their linkages to child outcomes to improve budget allocations/expenditure for children and/OR Policies and programmes are influenced by analysis and advocacy to reduce child poverty  ***Activity:*** PF4C and policy-making, for inclusive recovery. |
| **Background and Purpose:**  Four years into one of the most severe socio-economic and financial crises in modern history, Lebanon continues to grapple with its fallout. The situation worsened with the renewed conflict in the South of Lebanon, coming with severe repercussions and intensifying the challenges in the country. Meanwhile, the pollical landscape remains complex characterized by a prolonged vacuum since October 2022 with severe governance implications across public institutions.  In response to the multilayered crisis, the Government has been slow in undertaking necessary and serious reforms to stabilize the situation and pave the way for recovery, especially when it comes to the much-needed macro-fiscal stabilization framework.  The most vulnerable segments of the population are hard hit and bear the brunt of the crisis, disproportionately affected by the repercussions of the economic downturn and emerging challenges. Against this background of economic and political uncertainty and instability, the approval of the long awaited National Social Protection Strategy marks a positive step forward; the Government has yet to develop implementation arrangements and put in place specific governance measures to operationalize the Strategy.  In light of the rapidly changing context, frequent and regular policy analysis and regular monitoring of major developments and their effect, including new reforms, decisions, laws, national budget etc. are needed to inform UNICEF Lebanon Country Office (LCO) and to understand the potential impact on UNICEF programmes and their respective positioning. In addition, additional advocacy efforts have to be made with a wide range of governmental and non-governmental stakeholders towards the advancement of critical reforms that can foster social justice and pave the way towards a new social contract, inclusive development, and a rights-based approach to social protection.  To this end, UNICEF LCO seeks to establish long-term agreements (LTAs) with qualified local think tanks and national research institutions. The LTAs will allow UNICEF LCO to conduct regular and ongoing evidence-based policy analysis and advocacy in relation to inclusive development, public finance, and social protection, with the aim of improving policy making for the wellbeing of children and vulnerable groups in Lebanon. |

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| **General Conditions**   1. Due the variations in scopes and needs, the contractor will be requested to submit a brief proposal describing the process of conducting the required tasks and available expertise, before the initiation of a contract. 2. The contractor will ensure as much as possible gender balance with the deployments of its team working on the requested tasks. 3. The pricing should be calculated based on the annexed tabulation to this TOR. 4. The contractor team should be able to work using English and Arabic languages. 5. The report should be submitted either in English or Arabic if necessary / as requested. A translation service could be requested from the contractor and it will be costed as an independent service. 6. Having a Long-Term Agreement is not considered at any point a promise for signing contracts with UNICEF. 7. Consultants should act with integrity and respect for all stakeholders in line with UNICEF ethical guidelines regarding evidence generation. 8. UNICEF Lebanon Country Office holds copyrights for all reports and data. All data collected and products delivered under this agreement remains the sole property of UNICEF. The documents (including raw materials, data sets etc.) may not be reproduced, distributed, published, or shared with the media without the written permission from UNICEF. |
| **Management and financial arrangements**   1. The LTA will be managed by the Social Policy team at UNICEF. The LTA manager will manage all communications, in turn, the contractor is expected to assign a communication focal point. A specific staff member from UNICEF will be assigned to manage each contract issued under this LTA. 2. The contractor will commit to provide revisions based on provided feedback from UNICEF. 3. The payment schedule will be agreed on before the signature of each individual contract based on deliverables, on a basis that UNICEF cannot proceed with the first payment until at least one deliverable is submitted and accepted. 4. Payment schedule will be based upon the successful completion and submission of the deliverables and invoices by the required dates. UNICEF reserves the right to withhold all or portion of the payment if performance was unsatisfactory or failed to meet the deliverables. |
| **Quality Assurance**  The institution should do a preliminary review and apply quality assurance measures on any draft/products before sharing with UNICEF. UNICEF will only accept products of good quality in terms of conclusive content, clarity, consistency, alignment with this ToR, format, language, and other elements that may emerge during implementation or any subsequent details to be provided for each specific activity to be implemented under the LTA. UNICEF would engage partners, other technical persons, staff of UNICEF Lebanon Country Office, the MENA Regional Office and Headquarters in the review process. The consultancy institution and its assigned consultants should reflect the received reviews from UNICEF before claiming for any payments. |
| **Key tasks and deliverables**  The expected outputs and actual deliverables will be defined for each activity separately at the time of a specific assignment agreed in the contract. The contractor will be asked to undertake the specific assignment in all its phases including all steps required to complete the requested deliverables from planning to dissemination.  The LTA holders should ensure high quality of work and strong synergies with UNICEF during the implementation of the contract.  Meetings with UNICEF prior and during implementation of any contract under this LTA should be expected.  Sub-contracting for specific tasks is conditional to UNICEF approval.  For each contract, UNICEF will provide a brief description of the tasks and timeframe (scope of work) to complete the assignment, and the LTA holder should submit a short technical and financial proposal. The short technical proposal should reflect the experience of carrying the requested activities/deliverables listed in the TOR, delineate the background, design, methodology, approach, timeline, and budget, and the list of expert(s) with their CV to be engaged in delivering the tasks,  All analytical and advocacy products and processes (i.e. events) may be carried out jointly between the contractor and UNICEF.  All material produced under this assignment are the sole property of UNICEF, unless otherwise agreed.  Deliverables are subject to UNICEF quality assurance before being accepted. The LTA holder agrees to work with UNICEF through all stages of the quality assurance to ensure the quality of the outcome.  **Service 1: Policy Analysis and Advocacy**   1. Conduct analysis of the rapidly changing context with a specific attention to the economic (macro), political, and fiscal aspects, as well as ad-hoc analysis of emerging major issues and developments in the country, including new reforms, decisions, laws, national budget proposals/laws etc. and their potential impact on UNICEF programmes and planning. 2. Conduct analysis of the national budget proposal and/or law, budget execution, government fiscal performance, spending trend, and/or political economy, with a focus on social sectors. 3. Conduct analysis of quantitative and qualitative available data. 4. Conduct sector focused policy analysis based on UNICEF sector programmes needs (Health, Education, Child Protection, Nutrition, Youth Development, and WASH). 5. Develop materials and knowledge products to present and/or disseminate the findings through presentations, articles, policy briefs, policy notes, budget briefs, data briefs, analytical reports, situation analysis, fact sheets, position papers, and/or other products highlighting the situation of children, people with disability, women, and other vulnerable groups as per the assignment requirement. 6. Produce infographics, animations, and/or other visuals to disseminate major findings, in close coordination with UNICEF Social Policy and Communication sections. 7. The knowledge products, materials, and visuals are expected to be relevant to a wider audience which includes government bodies, development partners, civil society, children, adolescents, women, academia, private sector actors, parliamentarians, media and others. 8. The process of developing specific knowledge products may anticipate engagement with the government and key stakeholders, including children and young people. It serves as an opportunity to promote meaningful dialogue between the main child rights actors in the country on children’s and adolescents’ issues. 9. Present contextualized recommendations informing key stakeholders to attain/sustain inclusive social development that guarantees equal inclusion and participation of all groups of children, adolescents, women, and people with disability. 10. When a report is requested, submit a full report that is concise and succinct with an introduction and background, design and methodology, findings/results, conclusion, and recommendations. The report should include a short abstract or executive summary. 11. Facilitate a workshop, roundtable discussion, or dialogue to present and validate the findings and results and build consensus on recommendations, with relevant governmental and/or non-governmental actors, when needed. 12. Present the findings and recommendations to UNICEF and/or to a public audience or other relevant stakeholders. 13. Drafting key advocacy messages, when necessary, to be used for public communication (including social media) use. 14. Support in advocacy efforts aimed at informing public debates and shaping social policy making.   *The analysis should have a child angle and highlight inequalities across groups, socio-economic characteristics, and other dimensions, including gender and disability.*  **Service 2: Research, Content and Evidence-Based Knowledge Generation**   1. Produce research and evidence-based knowledge around inclusive social policy making, the right to social protection and access to services. 2. Produce data and generate evidence to raise awareness of key budget policies and issues, and advocate for inclusive and improved budget and tax policies and better public investments in children and vulnerable groups. 3. Draft recommendations for potential reforms, based on findings and results, to improve the wellbeing of children and vulnerable groups and advocate for a more inclusive and rights-based approach to social protection. 4. Conduct thematic research and sector focused evidence generation, case studies, and / or business cases based on UNICEF sector programmes (health, education, child protection, nutrition, youth development, and WASH). 5. Develop materials and knowledge products to present and/or disseminate the findings through presentations, articles, policy briefs, policy notes, budget briefs, data briefs, analytical reports, situation analysis, fact sheets, position papers, and/or other products highlighting the situation of children, people with disability, women, and other vulnerable groups as per the assignment requirement. 6. 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When a report is requested, submit a full report that is concise and succinct with an introduction and background, design and methodology, findings/results, conclusion, and recommendations. The report should include a short abstract or executive summary. 11. Facilitate a workshop, roundtable discussion, or dialogue to present and validate the findings and results and build consensus on recommendations, with relevant governmental and/or non-governmental actors, when needed. 12. Present the findings and recommendations to UNICEF and/or to a public audience or other relevant stakeholders. 13. Drafting key advocacy messages, when necessary, to be used for social media platforms. 14. Support in advocacy efforts aimed at informing public debates and shaping social policy making. 15. Comply with UNICEF procedures for ethical standards and quality assurance in evidence-generation.   *The research, content and findings should have a child angle and highlight inequalities across groups, socio-economic characteristics, and other dimensions, including gender and disability.* |
| UNICEF encourages the following types of organizations to bid.   * **Academics**: Faculties within the university, research institutes, divisions or other departments of universities may apply. It must be clear what part of the university entity is applying. * **Think tanks**: Privately organized or institutionally supported bodies providing policy analysis, research, and related services. * **Private consulting firms**: Entities specializing in providing policy analysis services and development of knowledge products.   Bidders can bid to be considered to provide one or more services depending on the capacity and expertise. Bidders should clearly indicate which service(s) they are applying for.    **Mandatory Qualification Requirements:**   * Demonstrated capacity to conduct policy analysis in one or more of UNICEF programme areas – social policy, child protection, education, health, nutrition, WASH, social and behavior change, and youth development. * Proven relevant experience (at least 10 years) in development of analytical reports and public policy documents / national strategies, and delivery of similar products and materials. * Demonstrated capacity to advise on policy reform to be provided to relevant governmental stakeholder. * Excellent skills in drafting policy briefs, articles, data briefs, position paper, analytical reports, situation analysis, fact sheets, presentations etc. * Experience in convening multiple governmental and non-governmental stakeholders and facilitating a dialogue and creating a debate. * Excellent skills in diplomacy, facilitation, institutional change, and dialogue creation to achieve consensus. * Experience in working with Government of Lebanon / public administration and knowledge and understanding of key actors, agencies, and relationships. * Knowledge of the Lebanese social, economic, legal, and political context. * Senior staff holding at advanced degrees (PHD / Masters) in economics, development studies, international affairs, political science, social sciences, public policy, or other relevant discipline. Other team members to hold a degree in economics, development studies, international affairs, political science, social sciences, public policy, or other relevant discipline in addition to years of technical and operational expertise. * Linkages to global or international research institutes is an added value. * References for previous assignments in line with areas the institutions apply to one or more of the above services. Previous experience with UNICEF is an advantage. * Fluency in English and Arabic – for all team members. * Excellent writing skills in English and Arabic. |
| **Evaluation process of the bids:**  The bids will be evaluated based on this criteria. Technical evaluation will contribute 70% while Financial proposals will contribute 30%. Financial proposal should use the formart in Annex 1.   |  |  |  |  | | --- | --- | --- | --- | | **Technical Evaluation Criteria** | | **Max Points obtainable** | **Benchmark** | | 1 | Overall Response | **5** |  | | 1.1 | Completeness of response and understanding of UNICEF requirements | 5 | Quality and comprehensiveness of the overall approach/methodology that meet the ToR requirements. | | 2 | Technical Expertise | **43** |  | | 2.1 | Extensive relevant experience (at least 8 to 10 years) in development of analytical reports and public policy documents, and capacity to advise on policy reform – demonstrated by team leader experience and completed assignments and references. | 18 | Experience of team leader in developing and drafting social policies, analytical reports, public policy documents, and/or national strategies (First 8 years will get 5 points, and one point for each additional year of experience, up to 8 points).  Previously developed documents  (One document is equivalent to 5 points, up to 10 points). | | 2.2 | Capacity to conduct policy analysis and skills in drafting policy briefs, articles, data briefs, position papers, analytical reports, situation analysis, fact sheets, presentations, visuals etc. and delivery of similar products and materials, in one or more of UNICEF programme areas – demonstrated by completed assignments and references. | 15 | Previously developed policy briefs, articles, or position papers etc. (5 products is equivalent to 5 points), infographics (5 infographics is equivalent to 5 points) and videos (5 points per video) | | 2.3 | Experience in convening multiple governmental and non-governmental stakeholders and facilitating a dialogue, roundtable discussion, and creating a debate. | 5 | Previous webinar or roundtable materials to be shared (2 webinars/roundtables equivalent to 2.5 points) | | 2.4 | Demonstrated technical experience in working across the Government of Lebanon and knowledge and understanding of key actors, agencies, and relationships. Knowledge of the Lebanese social, economic, and political context. | 5 | Previous technical support or public policy advice provided to government stakeholders, or collaboration across different government agencies in Lebanon. | | 3 | Capacity and Experience | **22** |  | | 3.1 | Profiles of senior staff and key personnel (up to 4) who will be involved in performing tasks under the LTA and details or relevant experience and qualifications (should include CVs). | 20 | Resume of team leader and other team members. 5 points per resume | | 3.3 | Linkages to global or international research institutes is an added value. | 2 | Previous collaboration, joint research initiatives, knowledge exchange programs, or co-authored publications. | | **TOTAL** | | **70** |  | |
| **Passing score for technical evaluation is 49 points.**  The Institution is expected to submit a financial offer separate from the technical proposal.  The technical proposal should include the following:   * A profile of the Institution, a short description highlighting relevant experience, along with proof of previous experience addressing the above evaluation criteria and requirements * The CVs of the core team members that will be engaged (up to 4 CVs) reflecting proven experience in relevant activity/deliverable.   The financial proposal should include the fee for each service to be provided in USD.  To ensure consistency across bidders, please use the annex **table of service** description and deliverables and add your proposed fees in USD. If needed, you can fill in the column for comments, remarks, or clarifications. |
| **Timing/Duration of LTA:** 2 years renewable for one additional year based on office need, market price and satisfactory performance**.** |
| **Duty Station:** Lebanon |
| **Administrative issue:** NA |