



## **Terms of Reference and Request for Proposal for an Individual Consultant to Conduct a Study to Assess the Effectiveness of MEFMI Capacity Building Activities Delivered in 2022 Implementation Year.**

### **1. Introduction**

These Terms of Reference (TORs) provide a guide and terms for the study to assess the effectiveness of the capacity-building activities MEFMI delivered during the 2022 implementation year. They constitute a critical instrument for communicating to the prospective consultants the nature and objective of the assignment, among others, including the scope, timelines, key requirements, and deliverables. The outcome of the study will help MEFMI draw lessons from both its successes and shortcomings arising from the delivery of the capacity-building activities, taking into account what has worked well and what has not, and what needs adjusting or complete overhauling.

### **2. Background**

The Macroeconomic and Financial Management Institute of Eastern and Southern Africa (MEFMI) is a regionally owned Institute launched in 1997, currently with 14 member countries: Angola, Burundi, Botswana, Eswatini, Kenya, Lesotho, Malawi, Mozambique, Namibia, Rwanda, Tanzania, Uganda, Zambia, and Zimbabwe. Its mandate is to build sustainable human and institutional capacity in identified key areas in Central Banks, Ministries of Finance and Planning; Revenue Authorities, Statistical Offices, and related institutions in the spheres of macroeconomic and financial management. The Institute also aims to foster best practices in these institutions and bring emerging risks and opportunities to the fore among executive-level officials.

Since 1997, MEFMI has been implementing its capacity-building activities using a phased approach, each comprising a period of 5 years. In 2022, MEFMI commenced the implementation of the Phase VI Strategy which runs up to 2026. The Phase VI Strategy is intended to guide MEFMI deliver on its mandate of building the capacity of its client

institutions (mainly comprising ministries of finance, planning, economic development, and central banks) in the member countries with a particular focus on macroeconomic, sovereign debt, and financial sector management.

### 3. The Purpose of the Study

The purpose of this study is to assess the extent to which MEFMI has been effective in delivering its capacity-building activities planned for and implemented during the 2022 implementation year.

Specifically, this will include determining the extent to which

- a) Programmes delivered the 2022 capacity-building activities as planned;
- b) Programme met the outcome indicator targets for 2022 as planned;
- c) MEFMI capacity-building activities delivered in 2022 resulted in the improvement of knowledge among the officials that received the training during the period under review;
- d) MEFMI client institutions are satisfied with the quality of capacity-building services rendered to them;
- e) MEFMI capacity-building activities delivered in 2022 have influenced change in behaviours and practices in the client institutions. This includes determining whether following the training, the officials in client institutions are applying the knowledge and skills acquired in their day-to-day work.
- f) MEFMI capacity-building activities delivered in 2022 have responded to the needs of client institutions.
- g) MEFMI has been innovative in delivering the capacity-building activities, taking into account the dynamic operating environment and emerging needs in the member countries.

### 4. Scope of the Study

This section presents the parameters of the study in terms of its scope as follows:

- a) **Coverage:** Geographically, the study will cover 13 MEFMI member countries.
- b) **Reach:** The study will consider a sample of trained officials from all the client institutions that benefited from MEFMI capacity building activities delivered in 2022.
- c) **Time:** The study will take 25 working days from the date of commencement of the assignment.
- d) **Target group:** Officials from Client Institutions that received training from MEFMI in 2022, including the heads of departments to which the trained officials report.

**Table 1: Study Criteria and Questions**

*The study criteria and questions are guided by the study objectives outlined in section above.*

Criteria	Questions
a) Timeliness in delivering the planned capacity building activities	1) To what extent have the programmes delivered the 2022 capacity building activities as planned?
b) Attainment of outcome indicator targets	2) To what extent have the programmes and MEFMI in general attained the 2022 desired/planned outcome indicator targets as outlined in the Results Measurement Framework?
c) Improvement in knowledge among the trained officials	3) To what extent have the capacity building activities delivered in 2022 resulted in the improvement of knowledge among the officials that received training during the referenced year?
d) Satisfaction with the quality of the capacity building activities	4) To what extent are MEFMI client institutions are satisfied with the quality of capacity building services rendered to them in 2022?
e) Change in behaviour/practice	5) To what extent have the capacity building activities delivered in 2022 influenced change in behaviours and practices in the client institutions in the member countries. 6) To what extent are the officials in client institutions trained in 2022 applying the knowledge and skills acquired in their day to day work?
f) Meeting the needs of the Client Institutions	7) To what extent have the capacity building activities delivered in 2022 responded to the need of the client institutions in the member countries?
g) Innovativeness	8) To what has MEFMI been innovative in delivering the capacity building activities, taking account account the dynamic operating environment and emerging needs in the member countries?

## 5. Approach and Methodology

The study methodological framework will adopt desk review (document review), sample survey, and mixed methods (both quantitative and qualitative) to collect data on the study questions set out in Table 1 above. The Consultant is also expected to use existing secondary data from the MEFMI reports, and other relevant documents. The study will be 100 percent virtual and no travel will be involved. In this case, the survey questionnaires will be administered to the respondents online or electronically. Key informant interviews with heads of client institutions and heads of departments in the member countries will be done virtually. The survey will be into two forms, targeting the officials that received training in 2022, on the one hand, and client institutions (this will an indicator-based survey) on the other hand.

Based on the above guide, the successful individual consultant will be required to devise a comprehensive and rigorous study methodology and data collection instruments during the inception phase.

**Table 2: Time Schedule and Key Deliverables**

Phase	Key Deliverable	Responsible	Timeline
Preparation	1) Terms of Reference	MEFMI	November 2022
	2) Publish Terms of Reference/Request for Proposals	MEFMI	December 2022
	3) Evaluation of Bids 4) Hiring of Consultants	MEFMI	January/February 2023
Inception	5) Inception Report covering, among others: (i) Detailed study methodology and approach (ii) Data collections tools (iii) Revised Comprehensive Work Plan	Consultant	3 days after signing of contract
Data Collection and Data Analysis	6) Preliminary findings	Consultant	12 days

Report Preparation	7) Draft study report. 8) Final study report	Consultant	10 days
Dissemination	9) The Final study report shared with the MEFMI Client Institutions.	MEFMI	March/April 2023

## **6. Management and Coordination of the Study**

The study will be managed and coordinated by the MEFMI Programme Manager responsible for Planning, Monitoring and Evaluation (M&E), under the overall guidance of the MEFMI Management Team led by the Executive Director. The Consultant will report directly to the Study Manager stipulated above.

## **7. Qualification and Competencies of the Individual Consultant**

The Individual Consultant should possess the following minimum qualifications and experience:

- a) Post-graduate degree in Economics;
- b) Post-graduate qualification in Monitoring and Evaluation (M&E);
- c) A track record of evaluation of capacity building activities or programmes of regional or international scale;
- d) Relevant expertise in capacity-building programmes within an African context;
- e) Conversant with participatory, qualitative, and quantitative evaluation methods;
- f) Conversant with the terminologies used in macroeconomic, financial, and debt management;
- g) Designing methodology and data collection tools
- h) Professional proficiency in the English language; and
- i) Working knowledge of the Portuguese language will be an added advantage.

## **8. Ethical Considerations**

The individual consultant is expected to conduct high-quality work guided by professional standards and ethical and moral principles. This is important because the integrity of the study and the credibility of the outcome thereof are dependent on the ethical conduct of the consultant throughout the study. Therefore, the individual consultant shall respect and protect the confidentiality, and rights of all the respondents. In the interest of ensuring that all participants are fully informed about the nature and purpose of the study and their involvement, only

participants who have given informed written or verbal consent should be included in the evaluation.

## **9. Budget**

This study is supported by a lumpsum budget of USD 10,000. Therefore, prospective individual consultants are expected to submit both technical and financial proposals not exceeding the stated amount.

Guided by the above Terms of Reference MEFMI invites eligible and qualified Individual consultants to submit their Technical and Financial proposals for consultancy services to conduct a study to assess the effectiveness of MEFMI capacity-building activities delivered in 2022.

The submissions ought to be made electronically (by email) with two (2) separate documents clearly marked “Technical Proposal” and “Financial Proposal”.

## **10. Technical Proposal**

The Technical Proposal should, among others, describe in detail, the individual consultant’s understanding of the terms of reference, and how the consultant intends to carry out the assignment. The Technical Proposal should demonstrate a clear understanding of the work to be undertaken, highlighting previous work done, that is relevant to this assignment. The Technical Proposal should include a detailed curriculum vitae (CV) of the prospective individual Consultant.

The financial proposal should indicate the proposed amount, which is all-inclusive. No profit, fees, taxes or, additional costs can be added after the award. MEFMI reserves the right to request additional information if the need arises.

All individual consultants bidding for this assignment ought to meet the required qualifications stipulated in the terms of reference

## **11. Bids Evaluation Criteria**

Technical and Financial proposals will be evaluated based on the following criteria and respective weights as indicated below.

## 11.1 Technical Proposal Evaluation Criteria

**Table 3: Technical Proposal Evaluation Criteria**

<b>Criteria</b>	<b>Weights</b>
<i>Specific experience of the individual consultant relevant to the assignment</i>	15
<i>Adequacy and quality of the proposed methodology, data collection techniques and tools</i>	25
<i>Detailed, clear, realistic work plan, including ease of implementation</i>	15
<i>Responsiveness of the individual consultant to the scope of work</i>	10
<i>Individual consultant's qualifications, and competence relevant to the assignment</i>	35
<b>Total</b>	<b>100</b>

The minimum qualifying mark on the Technical Proposal shall be 70% to proceed to the next stage of Financial Proposal evaluation.

## 11.2 Financial Proposal Evaluation Criteria

The individual consultant that meets the qualifying mark on the technical proposal will have their financial proposal opened and those that do not meet the minimum criteria will not be opened.

## 12. Weights

- a) Technical Proposal: **80 Points**
- b) Financial Proposal: **20 Points**

## 14. Submission

Technical and Financial Proposals should be submitted by email as separate attachments accompanied by a cover letter addressed to the Executive Director as stated below. Password secured Financial Proposals should be expressed in United States Dollars (USD). They will be requested by a designated official at MEFMI at the time of the financial proposal opening.

Submission of financial proposals that are not secured by a password will result in outright disqualification.

The proposals should be by email to [capacity@mefmi.org](mailto:capacity@mefmi.org) on or before Friday, 30 December 2022 at 16.30 hours, Local Harare time:

The cover letter should be addressed to

The Executive Director

The Macroeconomic and Financial Management Institute (MEFMI)

9 Earls Road, Alexandra Park

P. O. Box A1419 Avondale

Harare

ZIMBABWE