



MEFMI
Macroeconomic and Financial Management
Institute of Eastern and Southern Africa

Terms of Reference and Request for Proposal for an Individual Consultant to Conduct a Tracer Study of the Fellows Development Programme (FDP).

1. Introduction

These Terms of Reference (TORs) provide a guide and terms for the tracer study of the Fellows Development Programme (FDP).

2. Background

The Macroeconomic and Financial Management Institute of Eastern and Southern Africa (MEFMI) is a regionally owned entity 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 continues to advance MEFMI's mandate to the targeted client institutions in the member countries taking into account the dynamic delivery environment, changing and diverse needs of client institutions on the three thematic areas of macroeconomic, sovereign debt, and financial sector management.

As part of its larger capacity-building mandate in macroeconomic, sovereign, and financial management, MEFMI implements the Fellows Development Programme (FDP), a MEFMI flagship with the primary purpose of creating a regional pool of expertise in various areas of specialisation to spearhead capacity building in the member countries and the MEFMI region at large. In doing so, MEFMI trains Fellows at Graduate and Accreditation levels to contribute capacity enhancement in the region in various areas of specialisation within the three MEFMI thematic areas: macroeconomic, sovereign debt, and financial sector management.

3. The Purpose of the Study

The purpose of the study is to keep track of the Fellows Development Programme (FDP) of the Macroeconomic and Financial Management Institute of Eastern and Southern Africa (MEFMI). Specifically, the study intends to ascertain

- a) the whereabouts of Graduate and Accredited Fellows,
- b) how they have progressed in their careers,
- c) how the FDP has impacted their careers (this includes career growth/advancement, recognition in one's field of specialisation, competence enhancement, etc), and
- d) the extent to which they are contributing to capacity building in their respective work places, country and the region (value client institutions and the region at large are deriving from the expertise Fellows have acquired from the FDP).

Further, the study intends to assess the relevance of FDP and to identify recommendations for improvements.

4. Scope of the Study

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

- a) **Coverage and Target group:** the study intends to cover and reach all Graduate and Accredited MEFMI Fellows in the region.
- b) **Time:** The study will take 25 working days from the date of commencement of the assignment subject to the consultant's successful delivery of the assignment outputs.

5. Approach and Methodology

The study methodological framework will adopt desk review (document review), and mixed methods (both quantitative and qualitative) to collect the requisite data for the study. Through document review, the consultant is expected to use existing secondary data from the MEFMI reports, and other relevant documents. To collect primary data, the consultant will employ and deploy questionnaires to the MEFMI Fellows. The study will be 100 percent virtual and no travel will be involved. In this case, the data collection instruments will be administered to the respondents online or electronically. For Fellows that are currently serving in the respective client institutions in the member countries, key informant interviews with heads of departments in the member countries will be conducted virtually to get their perceptions of the benefit client institutions are deriving from the FDP, in particular, from the expertise of the Fellow/s in their institutions.

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 1 below gives a an indicative timeline for the study.

Table 1: Time Schedule and Key Deliverables

Phase	Key Deliverable	Responsible	Timeline
Preparation	1) Terms of Reference	MEFMI	April 2023
	2) Publish Terms of Reference/Request for Proposals	MEFMI	April–June 2023
	3) Evaluation of Bids 4) Hiring of Consultants	MEFMI	July 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	Sept 2023
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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 8,000. 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 tracer study.

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 2: Technical Proposal Evaluation Criteria

Criteria	Weights
<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
Total	100

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). The password 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 on or before Friday, 30 June 2023 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

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