



Term of Reference

M&E CONSULTANCY SERVICES

STRENGTHENING THE PEOPLE'S CREDIT FUNDS NETWORK (STEP)

 **Desjardins**
Développement international

 **STEP**

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LIST OF ABBREVIATIONS

CBV	:	Cooperative Bank of Vietnam (Co-opBank)
DID	:	Développement international Desjardins
GAC	:	Global Affairs Canada
EU	:	European Unions
PCF	:	People's Credit Fund
STEP	:	Strengthening the People's Credit Funds network

1. SUMMARY OF ASSIGNMENT

Objective(s):	Support the Project Field Director to collect and analyze information & data to monitor and evaluate the project's progress & effectiveness
Start Date:	06 February 2023
End Date:	15 April 2023
Type of contract:	Consultancy service contract
Location(s):	Ha Noi

2. CONTEXT

Développement International Desjardins (DID) is a non-government-organization which belongs to Desjardins Group in Canada. It was established with a mission to support the cooperative credit model in the world in general and in Vietnam in particular. It has implemented several projects in Vietnam since 1993 to assist the People's Credit Fund network in its establishment and development.

Since 2016, DID has collaborated with the Cooperative Bank of Vietnam to implement a project to support the development of the People's Credit Fund network (STEP) in Vietnam financed by Global Affairs Canada (GAC). STEP project's objective is: "**Strengthening access to finance for men and women in rural areas of Vietnam through strengthening the integration and performance of the network of People's Credit Funds and the Co-operative Bank**"

To achieve this goal, STEP focuses on activities to improve management and operation capacity for the Co-operative banks and PCFs, namely:

- Together with CBV to develop appropriate tools and solutions that can be deployed throughout the PCF network, improve CBV staffs' capacity to be able to support the PCF network.
- Support capacity development and improve operation efficiency of the PCFs, so that it can provide safe and sustainable products & services to meet the needs of people in rural areas.

The project Logical Framework describes the project's ultimate goals, expected outcomes, and planned interventions. The Performance Measurement Framework (PMF) presents 11 key indicators and 24 sub-indices to assess the achievement of intended results and a detailed explanation of the project's performance at 4 levels: outputs, immediate outcomes, intermediate outcomes and ultimate outcomes (long-term/end-of-term results). The PMF has been frequently updated with data collected from the last 6th years of the STEP project operations base on the project annual survey, data collected from each technical team and some other sources.

In the next 2 years, STEP will focus on consolidating the results achieved, completing some unfinished activities, and compiling recommendations for Co-opBank to develop strategies and plans to roll out the STEP's tools and solutions throughout the PCF network. STEP therefore need to review and strengthen the collection and analysis of information and data from its activities to validate the level of completion of its designed activities (based on the Project Implementation Plan - PIP), thus be able to evaluate the project completion and effectiveness. Based on this analysis, STEP should be able to draw conclusions and lessons learned, then provide appropriate recommendations for CBV and the concerned stakeholders to ensure sustainability of the intervention.

STEP wishes to find consultants with appropriate technical expertise and experience to continue and consolidate its monitoring, evaluation & learning activities.

3. OBJECTIVES OF THE ASSIGNMENT

The objective of the assignment is to provide technical assistance to the STEP Field Project Director in monitoring and evaluation of the project's effectiveness and efficiency through analyzing and evaluating the level of activities completion in comparison to the defined performance indicators. The consultant will also help to present and illustrate the data collected in a clear and easy-to-understand manner to explain how these results contribute to the realization of STEP's final objectives. Specifically, the consultant will help the Field Project Director to:

1. Collect fully and timely the required data and information of the STEP project activities.
2. Ensure accurate and consistent analysis and calculation of the PMF indicators
3. Provide detailed meaningful explanation of each indicator associated with project objectives/results/activities to demonstrate and ensure compliance with the rules and requirements for "Results-based management for international assistance programs" and "Guidelines for reporting international assistance results to partners" as entailed by GAC.

Therefore, we would like to select an experienced and capable consulting firm to perform the service at reasonable costs, good quality and ensure the deliverables by the deadlines.

4. SCOPE OF WORK AND REQUIREMENTS

The scope of work is listed, but might not be restricted to the followings:

- Study the donor's guidelines and requirements for M&E. Study the project documents to understand about strategic planning, the M&E system of project activities.
- Study the project documents, including the Logical framework, the PMF, reports ... to review and revise which appropriate data and information (qualitative, quantitative) to be collected, the method and tools to collect/calculate this data/information to best illustrated the defined PMF indicators.
- Collaborate with project experts to review and revise the M&E methods and tools such as questionnaires, surveys, reports, planning sheets etc.... to ensure the complete, accurate and timely collection & analysis of required information and data.
- Carry out necessary tasks according to existing/adjusted processes to collect data and information (contact & send questionnaires, receiving, searching, synthesizing data & information according to established forms, writing reports ...).
- Perform analysis and calculation of PMF indicators, ensure consistency of the data set to support the identification of these indicators over time. Analyze and alert data volatility to define trends and make appropriate recommendations.
- Explain the meaning of indicators associated with project objectives/results/activities to include in the contents of STEP's explanations and regular /ad-hoc reports to Vietnamese regulatory agencies and the donor.
- Based on the defined data and indicators, analyze and advice on the good practices/lessons learnt for the project stake holders.
- Advise on the communication strategy, planning and tools to disseminate the project's best practices targeting different stakeholder.
- Update the PMF, the Result based management worksheet, assist in presentation of the reporting data in sensible table/charts/graph as required.

5. DELIVERABLES

The following deliverables shall be provided in both English and Vietnamese:

- Detailed work plan including activities to be performed, number of working days, partners to work with, planned schedule, information collection tools, revised procedures for data/information collection (if applicable) to be agreed with the STEP Director 01 week from the start date of the contract.
- The global PMF fully updated by 15th April 2023 with corresponding indicators and explanations.
- Result based management worksheet fully filled with data from the PMF and narrative analysis of the progression by 15 April 2023.
- Report on best practices and lessons learnt for the project stakeholders by 15 April 2023.

Commented [HN1]: Howabout the survey questionnaires? Results? How to validate to make sure the data and information are accurate, truthful and fully, timely?

6. QUALIFICATIONS

- The consultancy is applicable for both firms and individual consultants.
- The consultant(s) involved in the assignment must have academic background in project management, development, M&E or other relevant aspects
- The consultant(s) must demonstrate relevant experiences on M&E. The lead consultant must have at least 5 years working on M&E for development project. Experience in working with Co-opBank, PCFs is an advantage.
- Be able to provide evidence successful completion of at least 03 similar projects/jobs.

Note: for individual/group consultants, the consultant must show evidence of fulfilment their compulsory insurance schemes as regulated by the labour law.

7. HOW TO APPLY

Interested consultants should submit their Proposal with at least the following documents:

1. Local consulting firm must send a copy of the business registration with consulting services. Consulting firms must not in the process of dissolution nor in bankruptcy, insolvency in accordance with the law
2. Competency profile stating the company/consultant's qualification and experiences, list of reference for similar jobs completed, resume of the consultant(s) who will perform the work required by STEP
3. Performance plan with detailed inputs of the selected consultants, number of working days for each task, delivery timing
4. Detailed price quotation as per the performance plan.

The Proposal should be submitted by email to info@did-step.com and huong.tran-thi-thanh@did-step.com, clearly indicating the email subject of "Proposal DID2022 – M&E consultancy services".

Kindly note that each email submission may not exceed 20MB in size.

The deadline for submission is on January 30th 2023, at 17h.00, Hanoi time.

We will select and contact the firms with the most competitive proposal only.

Développement international Desjardins (DID) is a world leader in the deployment and strengthening of the inclusive finance sector in developing and emerging countries.

Our expertise is based on over one hundred years of experience accumulated by the Desjardins Group, the leading cooperative financial group in Canada and sixth largest in the world.

We draw on the best practices tested in collaboration with our numerous partners to support the setup, growth and strengthening of financial institutions as well as the development of individual and collective wealth.

Consulting expert, investor and operator of financial institutions, DID provides its specialized expertise in the following fields:

- Mobilization of savings
- Agricultural Finance
- Technological Solutions
- Financing for entrepreneurs
- Investments
- Social Performance
- Training
- Surveillance
- Gender Equality
- Governance
- Green Finance

Focused on the future, DID makes use of all its resources in order to increase access to financial services for communities in developing and emerging countries. Together, we create the future. It is the ultimate reason for our existence.

www.did.qc.ca/en



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