

# Terms of reference (ToRs) for the procurement of services below the EU threshold

|                                                                                                                                            |                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| <b>Monitoring &amp; Evaluation (M&amp;E) capacity-building support to the Ministry of Trade, Agribusiness, and Industry (MoTAI), Ghana</b> | <b>Project number/<br/>cost centre:<br/>G-018082-001</b> |
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## **0. List of abbreviations**

|           |                                                                                                      |
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| BMZ       | German Federal Ministry for Economic Cooperation and Development                                     |
| GIZ       | Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH                                         |
| M&E       | Monitoring and Evaluation                                                                            |
| MoTAI     | Ministry of Trade, Agribusiness, and Industry                                                        |
| NDPC      | National Development Planning Commission                                                             |
| PPBME     | Policy Planning Budgeting Monitoring and Evaluation                                                  |
| PharmaVax | Strengthening the Ghanaian Pharmaceutical Sector with a Focus on Vaccine Production in Ghana Project |
| PSInno    | Private Sector and Innovation Promotion Project                                                      |
| SMTDP     | Sector Medium-Term Development Plan                                                                  |
| ToR       | Terms of reference                                                                                   |

## 1. Context

The *Ministry of Trade, Agribusiness, and Industry* (MoTAI) is responsible for coordinating and implementing policies and programmes that promote trade, industrial development, agribusiness, and private sector growth in Ghana. Effective monitoring and evaluation (M&E) are essential for tracking the implementation of the *Ministry's Sector Medium-Term Development Plan* (SMTDP), assessing progress towards planned results, and meeting national planning and reporting requirements. Thus, ultimately contributing to more effective and impactful policies.

With support from the *Deutsche Gesellschaft für Internationale Zusammenarbeit* (GIZ), commissioned by the *Federal Ministry for Economic Cooperation and Development* (BMZ) of Germany, MoTAI seeks to strengthen its M&E function. While the Ministry has an existing M&E framework within its SMTDP and an established M&E Technical Working Group, capacities across directorates vary, and there is a need to further strengthen monitoring processes, improve indicator and data-source alignment, enhance reporting systems, and build staff capacity to support consistent and effective implementation of the SMTDP.

To address these needs, GIZ intends to engage a consultancy to support the development and operationalization of a practical M&E framework and monitoring system for the SMTDP, while strengthening the Ministry's institutional and technical capacities for monitoring, reporting, and evidence-informed decision-making.

### 1.1 Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)

GIZ is implementing German development cooperation projects commissioned by the *German Federal Ministry for Economic Cooperation and Development* (BMZ) to support sustainable growth and public reforms in Ghana.

This M&E project with MoTAI is jointly supported by several projects in the field of Sustainable Economic Development of GIZ, including among others the *Private Sector and Innovation Promotion in Ghana* (PSInno) project as well as the *Strengthening of the Ghanaian Pharma Sector with focus Vaccine Production* (PharmaVax) project.

The PSInno and PharmaVax projects are part of the BMZ core theme and Development Cooperation Programme "*Training and Sustainable Growth for Good Jobs in Ghana*". The projects are being implemented by GIZ in collaboration with the *Ministry of Trade, Agribusiness and Industry* of Ghana. The objective of PSInno is to strengthen the competitive and employment-promotion economic development in selected sectors in Ghana, particularly in the north of the country. The objective of PharmaVax is to support the Government of Ghana in its initiative to expand local production of vaccines and pharmaceutical and to position Ghana as a hub of vaccine and pharmaceutical manufacturing in West Africa. Both projects together with other projects in the same sector will boost the economy and create employment.

The project is also supported by M&E Specialists in GIZ Ghana, working with projects in the field of Sustainable Economic Development.

### 1.2 Objective of the consultancy

The objective of the consultancy is to support MoTAI in strengthening its M&E function through:

(i) Developing and establishing an M&E framework and monitoring system for the SMTDP by refining the existing M&E framework, designing monitoring processes and tools, aligning

indicators and data sources, and developing a practical monitoring dashboard in line with national planning and reporting requirements.

(ii) Deepening and broadening M&E capacities within the Ministry through the design and delivery of tailored M&E training, on-the-job coaching, and technical support to the M&E Unit and the M&E Technical Working Group to strengthen the application of the SMTDP monitoring system.

The duration of the contract is from 15th October 2026 to 30th April 2027.

## **2. Tasks to be performed by the contractor**

The Consultant will undertake the following activities:

### **I. Monitoring Framework and System for the SMTDP**

- Collaborate closely with the MoTAI and GIZ M&E teams to develop a monitoring framework for the SMTDP building on the existing M&E framework outlined in the plan and refining, where necessary, indicators, baselines, and data sources, with particular emphasis on supporting the Ministry to identify appropriate data sources.
- Design a monitoring system for the SMTDP that defines data flows, roles and responsibilities, data collection and reporting tools, reporting cycles, and quality assurance mechanisms, including the establishment of a monitoring dashboard using digital tools that are available or readily accessible to the Ministry (e.g. Microsoft Excel, Kobo Toolbox, or similar). The system should assist decision makers in the ministry in assessing the impact of implemented policies and strategies. Thus, contributing to data-based policy making.
- Ensure that the monitoring framework and system are aligned with national planning and reporting requirements as well as the Ministry's existing institutional structures.
- Validate developed system/framework and tools in a validation workshop with MoTAI.
- Train the Ministry's M&E Unit on the use and application of the monitoring system, with particular focus on the monitoring dashboard.

### **II. Indicator Alignment and Identification of Data Sources**

- Moderate and facilitate a working session with the Ministry to identify, validate, and map data sources for the SMTDP indicators, including identifying data owners, reporting frequency, and existing data gaps.
- Prepare a consolidated data-source matrix and a concise report outlining identified gaps and recommended actions.
- Moderate and facilitate a working session with the Ministry to align sector indicators used to measure progress across the Ministry's principal policy areas, including industry, trade, and private sector development, taking into account the existing Sector Handbook and addressing inconsistencies between SMTDP indicators and the handbook.

- Develop and document updated and harmonized indicator definitions for integration into the Ministry's monitoring system.

### **III. M&E Training**

- Design and deliver a minimum of five M&E training workshops comprising:
  - a. one five-day training workshop on core M&E concepts and functions for approximately 15 staff of the M&E Unit;
  - b. three three-day training workshops providing foundational M&E knowledge for the M&E Working Group, the Business Regulatory Reform (BRR) Unit, and the SME Unit, each comprising approximately 10–15 participants; and
  - c. one two-day advanced training workshop for approximately 15 M&E Unit staff, focusing on technical topics identified during the initial training.
- Develop tailored training materials, practical exercises, and reference handouts for all five workshops, ensuring that the content is interactive and directly linked to the Ministry's SMTDP and the day-to-day M&E responsibilities of the relevant units, directorates, and working group.

### **IV. Support to the M&E Technical Working Group**

- Support the M&E Technical Working Group, building on the SMTDP monitoring framework, to clarify the roles and responsibilities of M&E focal persons or champions with respect to their contributions to SMTDP monitoring and reporting.
- Provide on-the-job coaching and technical support to individual Working Group members to strengthen their capacity to collect, compile, and report SMTDP monitoring data. WG members are enabled to translate monitoring data into actionable recommendations for decision makers.

### **V. Coordination, Reporting and Handover**

- The expert(s) work(s) in close coordination with and report(s) to the Director of PPBME, the Head of the M&E Unit at MoTAI as well as to the GIZ M&E Specialist and GIZ Advisors of PSInno and PharmaVax.
- Prepare recommendations on actions required to sustain and further strengthen the Ministry's M&E capacity, including measures to improve coordination and data sharing with relevant stakeholders.

## **3. Deliverables**

The consultants will deliver the following:

1. Refined M&E framework for the SMTDP.
2. Monitoring system (including processes, roles, tools, dashboard, reporting) for the SMTDP, with a special focus on a practical and easy to use dashboard and including a validation workshop.

3. Data-source mapping workshop: agenda, facilitation, and output matrix with gap analysis.
4. Indicator alignment workshop: agenda, facilitation, and proposal for aligned/ harmonized indicators.
5. On the job coaching regarding the developed monitoring system, dashboard and data collection.
6. Training package (concept, agenda, materials, workshops) including design and delivery of at least five training workshops.
7. Working session and on the job-coaching with members of the M&E Technical Working Group of the Ministry with regards to their respective roles, responsibilities and data inputs into the SMTDP monitoring and reporting.
8. Short final report (two-pager) and final closing session summarizing and discussing key findings and recommendations.
9. Close coordination and communication with MoTAI, especially PPBME and the M&E unit, as well as GIZ.
10. Organization of workshop logistics.

### Milestones and Deadline for the Consultancy

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

| Milestones                      | Deadline                       |
|---------------------------------|--------------------------------|
| Inception Report with work plan | 30 <sup>th</sup> October 2026  |
| Data source mapping matrix      | 6 <sup>th</sup> November 2026  |
| Monitoring dashboard (SMTDP)    | 27 <sup>th</sup> November 2026 |
| Training materials              | 15 <sup>th</sup> February 2027 |
| Final Report to GIZ             | 30 <sup>th</sup> April 2027    |

Period of assignment: 15<sup>th</sup> October 2026 to 30<sup>th</sup> April 2027.

### Work Plan

The assignment is expected to run over approximately **6 months**, organized in five phases:

| Milestone | Timeline /<br>Deadline | Description |
|-----------|------------------------|-------------|
|           |                        |             |

|                                                                      |              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phase 1 - Inception                                                  | Month 1      | <ul style="list-style-type: none"> <li>Kick-off with the Ministry's PPBME Directorate and its respective units, particularly the M&amp;E Unit, and GIZ; confirmation of scope, and detailed work plan;</li> <li>Document review (SMTDP, existing M&amp;E reports, etc.) and gap analysis regarding the SMTDP.</li> </ul>                                                                                                                                                               |
| Phase 2 - M&E framework, data source mapping and indicator alignment | Month 1-2    | <ul style="list-style-type: none"> <li>Refining of the existing SMTDP M&amp;E framework in consultation with the M&amp;E Unit;</li> <li>Facilitation of a data-source mapping workshop as well as of an indicator alignment workshop;</li> <li>Integration of workshop outputs into the framework;</li> <li>M&amp;E system/framework validation workshop;</li> <li>Design and establishment of the SMTDP monitoring system (processes, roles, tools, reporting, dashboard).</li> </ul> |
| Phase 3 - M&E training design and delivery                           | Months 2 - 4 | <ul style="list-style-type: none"> <li>Training content development for MoTAI comprising core M&amp;E concepts and functions as well as geared towards the developed monitoring systems and dashboard;</li> <li>Delivery of training workshops to MoTAI, including its M&amp;E Unit, SME Unit, BRR Unit as well as the M&amp;E Working Group.</li> </ul>                                                                                                                               |
| Phase 4 - Follow-on training delivery and on the job coaching        | Month 5      | <ul style="list-style-type: none"> <li>Development of training content on deepening topics (second training) identified during the first training for the M&amp;E Unit of MoTAI;</li> <li>Delivery of a two-day follow-on training for the M&amp;E Unit (of about 15 staff);</li> <li>On-the-job coaching of the M&amp;E Unit regarding the monitoring tools and dashboard developed.</li> </ul>                                                                                       |
| Phase 5 - M&E Technical Working Group                                | Months 5 - 6 | <ul style="list-style-type: none"> <li>Clarification of roles and responsibilities of M&amp;E Technical Working Group members (M&amp;E focal persons from different directorates) with respect to their inputs into the SMTDP monitoring and reporting.</li> </ul>                                                                                                                                                                                                                     |
| Phase 6 - Wrap-up and hand-over                                      | Month 6      | <ul style="list-style-type: none"> <li>Finalization of all deliverables;</li> <li>Submission of the final report with recommendations;</li> </ul>                                                                                                                                                                                                                                                                                                                                      |

|                        |                             |                                                                                                                   |
|------------------------|-----------------------------|-------------------------------------------------------------------------------------------------------------------|
|                        |                             | <ul style="list-style-type: none"> <li>Discussion of findings and recommendations at closing workshop.</li> </ul> |
| Final reporting to GIZ | 30 <sup>th</sup> April 2027 | <ul style="list-style-type: none"> <li>Short final report outlining key findings and recommendations.</li> </ul>  |

### Indicative Level of Effort

**Approximately 60 working days**, distributed as follows:

| #  | Task / Deliverable                                                                    | Indicative Days |
|----|---------------------------------------------------------------------------------------|-----------------|
| 1  | Inception, document review                                                            | 2               |
| 2  | M&E framework for the SMTDP                                                           | 5               |
| 3  | Monitoring system design, tool and dashboard development                              | 10              |
| 4  | Data-source mapping workshop (prep, facilitation, output)                             | 3               |
| 5  | Indicator alignment workshop (pre, facilitation, output)                              | 3               |
| 6  | M&E system validation workshop                                                        | 1               |
| 7  | Training design and materials                                                         | 8               |
| 8  | Delivery of training                                                                  | 16              |
| 9  | On the job training and coaching (i.e. on dashboard use, data collection tools, etc.) | 3               |
| 10 | Working session with M&E Technical Working Group and on the job coaching              | 3               |
| 11 | Final report                                                                          | 2               |
| 12 | Closing workshop                                                                      | 1               |
| 13 | Ongoing coordination with Ministry and GIZ                                            | 3               |
|    | <b>Total</b>                                                                          | <b>60</b>       |

## 4. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

## Technical-methodological concept

**Strategy (1.1):** The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter **Error! Reference source not found.** Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1).

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter **Error! Reference source not found.** (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) under **learning and innovation**.

## Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

## 5. Personnel concept

The tenderer is required to provide personnel (up to two experts) who are suited to filling the positions described, on the basis of their CVs (see Chapter **Error! Reference source not found.**), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

### Qualifications of Team Leader

- Education/training (2.2.1): Master's degree or equivalent postgraduate qualification in Public Policy, Public Administration, Development Studies, Economics, Project Management, or a related field. Professional certification in Monitoring and Evaluation, Results-Based Management (RBM), Project Management (e.g., PMP, PRINCE2), or related fields is desirable.
- Language (2.2.2): C1-level language proficiency in English.

- General professional experience (2.2.3): More than 10 years' experience designing M&E frameworks and systems, preferably for government policies or strategies. Evidenced by 3 or more referenced assignments.
- Specific professional experience (2.2.4): Minimum of 7 - 10 years' of demonstrated experience delivering M&E training and facilitating technical workshops with public-sector counterparts. Demonstrated experience leading the design and implementation of M&E frameworks, systems, performance measurement strategies for government policies, programmes, or national development initiatives, referenced by at least 3 assignments. Experience in the development of dashboards and with digital tools.
- Leadership/management experience (2.2.5): Minimum of 7 - 10 years of progressively responsible professional experience in monitoring and evaluation, including at least 5 years in a senior technical or leadership role; ability to coordinate across multidisciplinary teams and manage technical assignments involving government institutions, development partners, and other stakeholders.
- Regional experience (2.2.6): Familiarity with national planning and M&E architecture in Ghana (NDPC guidelines, SMTDP processes) is a strong asset. Familiarity with MoTAI and its key policies, including the SMTDP, is a strong asset.
- Development cooperation (DC) experience (2.2.7): Prior experience working on GIZ or similar international development agencies is a significant advantage.

#### Qualifications of Key Expert 1

- Education/training (2.2.1): Master's degree or equivalent postgraduate qualification in Public Policy, Public Administration, Development Studies, Economics, Project Management, or a related field. Professional certification in Monitoring and Evaluation, Results-Based Management (RBM), Project Management (e.g., PMP, PRINCE2), or related fields is desirable.
- Language (2.2.2): C1-level language proficiency in English.
- General professional experience (2.2.3): More than 10 years' experience designing M&E frameworks and systems, preferably for government policies or strategies. Evidenced by 3 or more referenced assignments.
- Specific professional experience (2.2.4): Minimum of 5 years' of demonstrated experience delivering M&E training and facilitating technical workshops with public-sector counterparts. Demonstrated experience leading the design and implementation of M&E frameworks, systems, and performance measurement strategies for government policies, programmes, or national development initiatives referenced by at least 1 assignment. Demonstrated experience in the development of dashboards and with digital tools.
- Regional experience (2.2.6): Familiarity with national planning and M&E architecture in Ghana (NDPC guidelines, SMTDP processes) is a strong asset. Familiarity with MoTAI and its key policies, including the SMTDP, is a strong asset.
- Development cooperation (DC) experience (2.2.7): Prior experience working on GIZ or similar international development agencies is a significant advantage.

## **8. Costing requirements**

### **Assignment of personnel and travel expenses**

| Fee days | Number of experts | Number of days per expert | Total | Comments |
|----------|-------------------|---------------------------|-------|----------|
|          |                   |                           |       |          |

|                                                                                                                      |                 |                          |                    |                                                                                                                                                                             |
|----------------------------------------------------------------------------------------------------------------------|-----------------|--------------------------|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Key Expert 1 (Team Leader)                                                                                           | 1               | 30                       | -                  | Level 3                                                                                                                                                                     |
| Key Expert 2 (M&E expert)                                                                                            | 1               | 30                       | -                  | Level 3                                                                                                                                                                     |
| <b>Travel expenses</b>                                                                                               | <b>Quantity</b> | <b>Number per expert</b> | <b>Total</b>       | <b>Comments</b>                                                                                                                                                             |
| No travel foreseen                                                                                                   |                 |                          |                    |                                                                                                                                                                             |
| <b>Transport</b>                                                                                                     | <b>Quantity</b> | <b>Number per expert</b> | <b>Total</b>       | <b>Comments</b>                                                                                                                                                             |
| <b>Travel expenses (train, car)</b> <ul style="list-style-type: none"> <li>Car (Uber/Vehicle rental/fuel)</li> </ul> | 1               | 2                        | 6,350 GHS          | A lump sum of 3,175 GHS per consultants to cover fuel costs                                                                                                                 |
| <b>Other costs</b>                                                                                                   | <b>Number</b>   | <b>Price</b>             | <b>Total</b>       | <b>Comments</b>                                                                                                                                                             |
| Training Workshops/Training courses                                                                                  | 5               | -                        | <b>222,100 GHS</b> | Conference package for 20 people including stationery: 15 participants + 2 M&E consultants + 3 GIZ M&E team for minimum of 2 – 5 days per workshop (for details see above). |
| Stakeholder Events/Working sessions                                                                                  | 4               | -                        | <b>63,450 GHS</b>  | Conference package for 20 people: 15 participants from MoTAI + 2 M&E consultants + 3 GIZ M&E team for a day's event each                                                    |
| Communication                                                                                                        | 1               | 130 EUR                  | <b>1,650 GHS</b>   | The budget is a lump sum to be reimbursed against evidence.                                                                                                                 |
| Flexible Remuneration                                                                                                | 1               | 24,370                   | <b>24,370 GHS</b>  | A budget of 24,370 GHS for flexible remuneration for unforeseen circumstances.<br><br>Use of the flexible remuneration item                                                 |

|  |  |  |  |                                           |
|--|--|--|--|-------------------------------------------|
|  |  |  |  | requires prior written approval from GIZ. |
|--|--|--|--|-------------------------------------------|

## Workshops, events and trainings

The contractor designs and delivers at least five training courses on M&E concepts, including:

- 1 training workshop of about five days on core M&E concepts and functions for about 15 staff of the M&E Unit;
- 3 training workshops of about three days each, extending basic M&E content to the M&E Working Group, the Business Regularity Reform (BRR) Unit and the SME Unit of MoTAI (each unit comprising up to 15 staff respectively), and
- 1 training workshop of about two days deepening technical content for the M&E Unit (about 15 staff) on specific topics identified during the first training.
- All trainings are envisaged to take place in Accra.
- The contractor is responsible for organizing venue, catering, stationery and associated costs for the training workshops.

The contractor designs and delivers at least 4 working sessions/stakeholder events:

- Moderate and facilitate a (1) working session with the M&E Unit of MoTAI (data mapping workshop) for up to 15 participants
- Moderate and facilitate a (1) working session with MoTAI on indicator alignment for up to 15 participants
- M&E system validation workshop with MoTAI for up to 20 participants including the two consultants and two - three GIZ staff.
- Closing stakeholder event with MoTAI and GIZ for up to 20 participants (including consultants).
- All workshops/workings sessions/stakeholder events are envisaged to take place in Accra.
- The contractor is responsible for organizing venue, catering, stationery and associated costs for the workshops and trainings. No per diems will be paid to participants.

## 9. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

None

## 10. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in the English language.

The complete tender must not exceed **10** pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 5 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs should be submitted in the English language.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.