



REQUEST FOR A PROPOSAL (RFP) FOR THE INDEPENDENT REVIEW OF THE TDB GROUP SUSTAINABILITY DEVELOPMENT IMPACT MONITORING SYSTEM (SDIMS), M&E POLICY, AND M&E OPERATING GUIDELINES MANUAL

TDB Group invites proposals from qualified and experienced firms to carry out an independent review of the Group's SDIMS, M&E Policy and M&E Operating Guidelines. The selected firm will be responsible for undertaking a gap analysis and provide suggestions to improve the sustainability and development impact reporting tools in accordance with international best practices.

1. BACKGROUND

TDB Group is a regional development finance group that was founded in 1985. It is a multilateral, treaty-based, investment-grade development finance institution. Its diverse shareholder base includes regional and non-regional member states and institutional investors from Africa, Europe, and Asia.

TDB Group's membership spans across 25 countries from across the Common Market for Eastern and Southern Africa (COMESA), the East African Community (EAC), the Southern African Development Community (SADC), the Intergovernmental Authority on Development (IGAD), and most recently, West Africa. TDB Group's mandate is to finance and foster trade, regional economic integration and sustainable development through various financial services, including trade finance, project and infrastructure finance, asset management, and business advisory support. The Group is dedicated to promoting development in line with the global sustainability agenda.

TDB Group comprises all subsidiaries and strategic business units, as entities over which it has control or significant influence. This assignment includes reporting on the activities of the Trade and Development Bank (TDB), Trade and Development Fund (TDF), Eastern and Southern African Trade Fund (ESATF), Eastern and Southern African Trade Advisors Limited, (ESATAL) the fund management company, TDB Captive Insurance Company (TCI) and the TDB Academy.

TDB Group is committed to enhancing transparency, accountability, and sustainability in its operations. Integrated reporting is a key tool to communicate the Group's financial performance alongside its social and environmental impacts. By adopting integrated reporting, TDB Group aims to provide stakeholders with a holistic view of its business model, strategy, and value creation process in addition to meeting the regulatory financial and environmental reporting requirements.

2. OBJECTIVES OF THE ASSIGNMENT

The objective of this assignment is to undertake a gap analysis and assessment for the TDB Group's SDIMS, M&E Policy, and M&E Operating Guidelines - to ensure that they are fit for purpose and respond to the Bank's current needs with respect to collecting, analyzing and reporting on development impact for the Group's activities. This review will be able to identify any gaps and propose improvements to ensure the manuals, tools and instruments respond to TDB Group's objectives.

3. SCOPE OF THE ASSIGNMENT

The selected firm will be expected to:

- a) Provide a comprehensive assessment of the TDB's existing SDIMS, M&E Policy and M&E Operating Guidelines in consideration of the expectations of both TDB's internal and external shareholders including applicability, relevance and adequacy to the TDB Group activities.
- b) Identify additionality guidelines and propose their inclusion in the TDB Group M&E Operating Guidelines, to be in line with Additionality and Development Outcomes Assessment (ADOA) Framework.
- c) Assess and review the alignment and consistency of the M&E Policy, M&E Operating Guidelines with the SDIMS, which is the overarching framework for the documentation. Propose modifications to existing checklists, tools and instruments that capture data and information to align with current TDB Group structures and best practices.
- d) Review the relevance of the documents to the subsidiaries of TDB Group for better measurement and reporting of development impact in line with the TDB Group's strategic priorities as stated in the latest Corporate Plan (2023-2027).
- e) Develop a robust system comprising of SDIMS, M&E Policy and M&E Operating Guidelines by incorporating the lessons learned from the review process and also ensuring their seamless implementation to achieve a robust measurement and reporting of Sustainable Development Impact across the TDB Group.
- f) Make appropriate recommendations for embedding M&E processes and relevant clauses as part of legal covenants in the legal documentation for TDB Group-financed projects and transactions.
- g) Assess whether the current SDIMS, M & E policy and M & E operating guidelines are designed to address all risks, and capture information and data relevant to the TDB Group offerings, services, internal and external stakeholders. Recommend improvements and enhancements as appropriate.

4. QUALIFICATIONS AND EXPERIENCE REQUIREMENTS

The selected Consultant will be responsible for the overall planning and implementation of the review and development, the production and presentation of the final report and timely presentation of deliverables. The Consultant profile should meet the following requirements:

Qualifications, skills, and specific professional experience:

- At least master’s degree in social sciences, Economics, M&E, Statistics, Demography, Development Studies, Project Management, or a related field.
- At least 10 years in undertaking gap analysis and improvement for sustainable M&E frameworks for Development Finance Institutions, World Bank, AfDB among others.
- Proven experience of understanding international best practices on sustainable development impact measurement and reporting.
- Proven experience in assessing, evaluating or reviewing impact measurement framework and methods for development financial institutions, multifaceted programs and lender community.

5. REPORTING REQUIREMENTS AND TIME SCHEDULE FOR DELIVERABLES

The reports listed in Table one below shall be submitted to the Executive, Portfolio Management on or before the scheduled dates. The reporting requirements and timelines for deliverables are as shown in Table 2 below:

Table 1: Reporting requirements

No.	Activity	Timeline	Responsible
1.	Inception report	One week after signing the contract	To deliver an inception report that shall reflect clear comprehension of the tasks, the method of execution and work plan to ensure the final outcome is in line with TDB Group’s expectations. A soft copy in Word version
2.	Draft report	6th week	The draft reports should contain the following information but not limited to: <ul style="list-style-type: none"> • Comprehensive assessment of the SDIMS, M&E Policy and M&E Operating Guidelines in line with current best practice and the Group’s strategic objectives. • Propose changes and recommendations to improve and align the SDIMS, M&E Policy and M&E Operating Guidelines to the Group strategy including its subsidiaries.

			<ul style="list-style-type: none"> Propose for inclusion of additionality guidelines into the M&E Operating Guidelines, to be in line with Additionality and Development Outcomes Assessment (ADOA) Framework. <p>The draft report should be submitted in Word format.</p>
3.	Final report	8th week	<p>The final report should contain the following information:</p> <ul style="list-style-type: none"> Well-developed SDIMS, M&E Policy and M&E Operating Guidelines. Updated M&E Operating Guidelines with incorporated additionality guidelines to be in line with Additionality and Development Outcomes Assessment (ADOA) Framework. Alignment of M&E Policy and M&E Operating Guidelines with TDB's SDIMS. These documents should respond to the TDB Group's strategic priorities and theme as stated in the latest Corporate Plan (2023-2027). <p>Two (2) Original hard copy and electronic copy both PDF and word</p>

6. PAYMENT SCHEDULE

The proposed payment schedules based on satisfactory performance of the contract which will be negotiated with the successful consultant will be as presented in Table 3 below.

Table 2: Proposed payment schedule

S/No.	Deliverables	Timelines after contract commencement	Percentage of the contract amount
1	Acceptable Inception report; and data collection tools	One week	20
2	Approved Draft report	6th week	50
3	Final report	8th week	30

Upon submission of every report, the consultant is expected to make a presentation of the submitted report to the Client in a scheduled meeting. All reports shall be accepted by written confirmation by TDB.

7. ESTIMATED TIME-INPUTS FOR THE CONSULTANT

The estimated time input for the assignment is presented in Table 5.

Table 3: Estimated Time Input

S/No	Key Expert	Estimated Input (expert days)
1	Preparation of inception report	5
2	Comprehensive assessment (Gap analysis) for SDIMS, M&E Policy and M&E Operating Guidelines	15
3	Updating the documents with proposed changes and submission of draft to TDB	10
4	Incorporating changes from TDB	4
5	Submission of final report	1
	Total days	35

8. INVITATION TO SUBMIT PROPOSAL

Proposals should contain the following elements:

8.1 Technical Proposal

- Comments on the ToR and understanding of objectives.
- Description of methodology and approach.
- Outline of team structure, including roles and responsibilities of team members.
- CVs of key individuals, tailored to the assignment, annexed to the proposal.
- Summaries of at least 3 relevant previous assignments.
- At least 3 relevant references and their conduct details.

8.2 Financial Proposal

- An itemised budget for both professional fees and reimbursable expenses, including fee rates.
- The budget should be in USD net of taxes.

9. DURATION OF THE ASSIGNMENT

The assignment is scheduled to take place over a duration of 8 weeks, with the preliminary timetable for delivery of the various elements in the scope of work as indicated below. The consultant is expected to factor in a review period by the client of at least 5 working days.

10. PRESENTATION AND DECISION PROCESS

Shortlisted firms will be advised and, if necessary, will be expected to present to the TDB Group Taskforce at an agreed upon date and time. The Taskforce will deliberate and decide on the appointment of the winning firm. The final decision will be communicated to the

winning bid. TDB Group reserves the right not to communicate further with those who do not make it past the shortlisting process. TDB Group is not bound to accept the lowest bidder.

11. CONFIDENTIALITY AND SUBMISSION DEADLINE

Any confidential information provided to the Consultant by TDB Group is to be treated in accordance with confidentiality requirements specified by TDB Group. Proposals should be:

- a) Dated and signed, and
- b) Submitted electronically in Microsoft Word or Adobe Acrobat format and sent with the subject **INDEPENDENT REVIEW OF THE TDB GROUP SDIMS, M&E POLICY, AND M&E OPERATING GUIDELINES** to the following email: procurement@tdbgroup.org.

The bids should be submitted no later than 17h00 hours Nairobi Time on Friday 23rd August 2024.

***Disclaimers:** This RfP is subject to TDB Group Procurement Policy and TDB reserves the right to reject any proposal that is not in the abovementioned email mailbox by the deadline. Only the successful bidders shall be contacted for further negotiations.*

TDB Group reserves the right to independently verify submitted documents, listed clients and similar works. TDB Group is not obliged to give any reason for not selecting any persons/firm. TDB Group reserves the right to discontinue this process without reference to any entity.