Terms of Reference / Job Description

Monitoring, Evaluation, Research and Learning (MERL) Manager

1. Background to the position

The National Treasury fulfils a pivotal role in implementing and managing South Africa's public finances. Recent reforms at the legislative and policy levels have provided a framework to improve financial management at the national, provincial and local levels. The National Treasury has been driving many of these improvements with a range of financial management and capacity development initiatives as part of its Capacity Development Strategy for Public Financial Management. This Strategy aims to support continuing improvement in public financial management by enhancing organisational capacity and developing the skills of public sector workers.

The SECO-funded project "Procurement Infrastructure and Knowledge Management (PINK) Capacity Development Programme" aims to support the National Treasury's priorities in developing capacity to improve procurement practices and infrastructure management. The PINK's main objective can be summarized "increased cost effective, socially inclusive and sustainable service delivery at provincial and local government level". This will be achieved through three Key Results Areas (KRAs):

- KRA 1 – More effective supply chain management (procurement) at local government level.
- KRA 2 – Enhanced infrastructure management (budgeting, planning and asset management) at local government level.
- KRA 3 - Crosscutting Activities – Knowledge Management and Peer Learning.

A series of eight projects will be carried out to deliver the results required in these three KRAs.

2. Overall objective of the assignment

The PINK Programme has developed a Monitoring, Evaluation, Research and Learning (MERL) Strategy which sets out the main goal and objectives of the MERL System. The main goal of the MERL System is to provide the programme management unit (PMU) and project owners within National Treasury with a MERL framework for facilitating learning and continual improvement. It will also support in tracking progress, demonstrating results and guiding evaluation of the PINK Programme as well as beyond.

The specific objectives of the MERL plan are:

1. To assist the PMU and all project owners / stakeholders in assessing the performance of the PINK Programme and the sub-projects in accordance with agreed objectives and performance indicators, to support management for results and evidence-based decision-making.
2. To facilitate and drive continuous learning knowledge management by all stakeholders and promote the effective use of information generated by PINK and other National Treasury projects.
3. To facilitate high-quality reporting and communication among relevant audiences of important messages relating to the progress of the Programme and its projects.

4. To build the capacity of key stakeholders to promote regular and systematic review of the progress of PINK implementation in order institutionalize learning and knowledge management (for instance by providing learning for instance related to the outcome harvesting methodology).
5. To build understanding, acceptance and support for MERL and continual learning on the part of all relevant stakeholders and encourage its widespread adoption.
6. To facilitate review of the MERL System and Plan to ensure it continues to meet stakeholder needs.

The **outcomes** of the MERL Plan will be:

1. Timely reporting on progress in implementing PINK to all stakeholders;
2. Providing a firm foundation for objective and evidence-based decision-making for performance improvement, planning and resource allocation;
3. Increased accountability to government, other stakeholders and citizens;
4. Enhanced ownership (NT, provincial treasuries and municipalities) and support to change management processes/buy-in from stakeholders
5. Evidence-based MERL System review and development for the Capacity Building team within NT (beyond PINK);
6. Evidence-based judgement and presentation of results illustrating successes, challenges and lessons learned by the Programme;
7. Changes in attitude, behaviour and practices towards MERL, illustrating acceptance and adoption of continual learning approaches; and
8. Enhancing knowledge management and institutional memory on the process and results of implementing the PINK Programme.

3. General scope of work

The MERL Manager will be responsible for implementing the MERL plan and provide the programme management unit (PMU) and project owners within National Treasury with a MERL framework for facilitating learning and continual improvement.

The MERL manager will work closely with the other M&E experts within NT as well as with the Knowledge Management Unit of National Treasury.

4. Specific scope of work

The MERL Manager will be specifically expected to:

1. Develop PINK's MERL workplan, consult with project owners, validate and implement it. Continually review the workplan and results and implement activities to improve the MERL system as required.
2. Work with project owners to ensure that MERL frameworks (including Theories of Change and indicators) are included in their project designs, and that these frameworks are 'nested' within the overarching PINK Theory of Change and Results Framework (RFW), i.e. they are aligned with it and will produce evidence that will allow PINK to answer its high-level evaluation questions.
3. Assist project stakeholders with MERL expertise, and quality assure MERL results from Projects. Ensure consistent, constructive and professional learning advice to projects to improve their MERL systems and results.
4. Implement the required Outcome Harvesting, Surveys and Research Projects / Case Studies as required.
5. Write reports from the above activities and present the outcomes and lessons learned to the project stakeholders.
6. Strengthen the MERL's links with the Knowledge Management Unit and ensure that key products, results, success stories etc. are available and shared through the Knowledge Management platform.
7. Carry out supervision and quality control / data audit as required.
8. Develop and implement a reporting and communication / dissemination plan, which will cover monthly reporting, quarterly reports and an annual report and workplan for evidence-based decision making.
9. Review the MERL System on at least a yearly basis and develop activities for continual improvement.

5. Required qualifications

Applicants must meet the following requirements.

- Master's Degree in Evaluation, Economics, Development, Management, or a relevant discipline.
- At least 7 years of relevant monitoring and evaluation work experience, particularly establishing, implementing and updating an M&E Plan, including Theory of Change and Results Frameworks.
- At least 3 years of practical experience with Monitoring and evaluation of capacity development initiatives.
- Demonstrated understanding of the challenges that exist at the Municipal level in South Africa in the field of service delivery
- Experiences related to learning approaches.
- Demonstrable experience with developing and implementing communication / dissemination plans as well as presenting findings and lessons learned to a broad audience.
- Experience with donor-funded projects

6. Requested professional experience and skills
Candidates with any aspects of the following experience or skills in addition to the required characteristics above will score highly.

M&E experience:
- Experience with qualitative outcome-focused evaluation techniques; direct experience with Outcome Harvesting techniques will score particularly highly.
- Experience implementing stakeholder satisfaction and perception surveys.
- Experience with either or both of the following experience related to research projects or case studies:
    o Designing and directly implementing research projects or case studies; and/or
    o Designing research projects and case studies, then carrying out procurement or recruitment processes to outsource the implementation; and carrying out management / quality assurance of the process and results.
- Data analysis and presentation of both qualitative and quantitative results.
- Practical experience in developing and implementing communication and outreach activities (e.g. seminars, newsletters, articles) to share experiences, outcomes and learnings of project implementation.

Technical Experience:
- Any experience of working with local governments, particularly in an M&E-related role, will score particularly highly.
- Experience with technological solutions for knowledge sharing (knowledge platforms, chats, IT….).
- Any demonstrated experience in the following technical areas:
    o Supply chain management and procurement at the local level.
    o Infrastructure management (budgeting, planning and asset management)
    o Knowledge Management and Peer Learning approaches

7. Coordination with other activities / other programmes
The MERL manager of the PINK programme will work closely with MFIP III (NT funded programme), EU funded FMIP IV, GIZ GSP II and the IDMSBOK General Budget Support Programme.

National Treasury's funded programme MFIPIII, provides support to Local Government. The programme's focus is on the six game changers: Audit outcomes, Budgeting and Reporting, Asset Management, SCM, Revenue Management and mSCOA.

The EU funded Financial Management for Improved Service Delivery (FMISD) PFM Capacity Development Programme will include broad-scale education, training and development (ETD) solutions for PTs and municipalities on SCM.

GIZ's Governance Support Programme (GSP) II programme, which is focused on selected municipalities in Mpumalanga and the Eastern Cape Provinces, seeks to conduct a comprehensive review of the SCM value chain per municipality and make recommendations for its improvement.

The infrastructure focus area of the PINK SECO intervention will also be supported by the IDMSBOK process and intervention. The IDMSBOK is co-funded by the General Budget Support Programme and the CD: Provincial and Local Government Infrastructure.

8. Location and reporting
The appointed resource for the duration of the project will be based at the National Treasury Offices and will report to the programme coordinator of the PINK PMU in terms of day-to-day operational requirements and performance management.

9. Timeframe
The MERL Manager will be appointed based for the duration of 24 months.

10. Contractual arrangements
The appointed resource will be contracted as a consultant by Ecorys who is the PINK implementing agent.

Note that whilst the contract would be for 24 months, the first 6 months will be considered a probation period after which it will be upon the discretion of the contracting party "Ecorys" to continue with the contract for the remaining 12 months. Therefore, Ecorys is under no obligation whatsoever to extend the contract.

11. Monitoring and reporting
Monthly activity reports on progress against the approved work plan or support plan and specified key performance indicators will be compiled and submitted to the Programme Coordinator.

The MERL manager is also expected to provide inputs to the following reports:

Name of report	Content	Time of submission
Contribution to quarterly activity reports of PINK programme	Short description of progress (technical and financial) including problems encountered; planned work for the next 3 months	Quarterly

12. Submission of applications
All applications for this position together with the corresponding documents should be emailed to Thabisa.Myolwa@treasury.gov.za before **13 July 2020 at 11:00 AM South African Standard Time**.

Late applications will not be considered.