



## TERMS OF REFERENCE (INDIVIDUAL)

### Technical assistance in conducting a Midterm Review of the Strengthening Public Expenditure Management (SPEM) Project in Belize

<b>Institution:</b>	Ministry of Finance
<b>Country:</b>	Belize
<b>Project:</b>	Strengthening Public Expenditure Management (SPEM) Project in Belize
<b>Process ID:</b>	BL-L1038 – P00062
<b>Duty Station:</b>	Belize and individual's place of residency.
<b>Deadline:</b>	<b>August 22<sup>nd</sup>, 2025</b> ; 10:00 a.m. (Local Belize Time)

#### **1. BACKGROUND**

The Government of Belize has received loan financing from the Inter-American Development Bank (IDB) for the implementation of the Project – Strengthening Public Expenditure Management in Belize – SPEM (5353/OC-BL-L1038). The general objective of the project is to promote the fiscal sustainability of Belize. The specific objective is to increase the efficiency of public resources by strengthening public financial management. The SPEM Project is a five (5) year project aimed at promoting the fiscal sustainability of Belize and is currently in its third-year implementation.

The project is comprised of a single component with four (4) subcomponents as follows: (i) Financial Management, to improve the efficiency of key expenditure functions; (ii) Procurement, to improve efficiency by promoting economies of scale and competitiveness among suppliers in the acquisition of all goods and services; (iii) Technological Infrastructure, to promote a more sustainable technological infrastructure enabling processes to be more reliable and faster; and (iv) Strengthening Capacity Building, to improve institutional capacity for personnel to carry out processes and operate systems efficiently.

As the implementing agency for this Project, the Ministry of Finance through its Central Executing Unit (CEU) will contract the necessary services to conduct a midterm review of the Project to support improvements in the execution process and assess the results of the Project.

#### **2. OBJECTIVE AND SCOPE OF WORK**

**Main Objective:** is to assess the overall project progress, effectiveness, and operational efficiency of the Public Expenditure Management project in Belize at the mid-point of implementation, in order to determine the likelihood of achieving the intended outcomes and to identify necessary adjustments that will enhance project execution and sustainability.

### Specific Objectives:

- **Progress and Result assessment:** Evaluate the extent to which the project's objectives and outcomes, as defined in the Logical Framework and Results Matrix, are being achieved.
- **Performance of Execution Mechanisms:** Assess the operational efficiency of the executing structures including coordination, decision-making, and administrative support.
- **Identification of Bottlenecks and Delays:** Analyze the main obstacles and causes of delays in implementation, including procurement, disbursement, and institutional coordination challenges.
- **Monitoring and Reporting System:** Assess the adequacy of monitoring mechanisms, use of performance indicators, and reporting systems for tracking progress and informing decision-making.
- **Stakeholder Engagement and Ownership:** Analyze the level of involvement and ownership of key stakeholders, including line ministries, technical units, and beneficiaries.
- **Forward-Looking Recommendations:** Provide actionable recommendations to improve execution in the remaining period, including possible adjustments to implementation strategies, institutional arrangements, and resource allocation.

### 3. RESPONSIBILITIES/ ACTIVITIES

The Consultant will work in close collaboration with the Central Executing Unit (CEU) and key personnel from the Ministry of Finance (MoF). The following activities are to be undertaken to fulfil the objectives of the mid-term evaluation:

- **Preparation and Work Planning:** Develop and submit a draft detailed work plan, including descriptions of activities and deliverables, a timeline, and a methodology aligned with the evaluation objectives.
- **Inception Mission and Stakeholder Engagement:** Conduct an inception mission to meet with stakeholders, refine the scope of work, and collect relevant data and insights to guide the evaluation.
- **Document Review:** Collect and analyze key documents such as the Results Matrix, loan contract, progress and financial reports, and any existing evaluations or monitoring outputs.
- **Development of Evaluation Framework:** Develop a framework for the assessment of the program implementation process and performance of the SPEM Program. This includes, assessing the program against the evaluation criteria and answering key monitoring questions such as:

- ***Coherence monitoring:*** Do the activities and processes developed correspond to the goals established in the program?
- ***Financial monitoring:*** Are the funds being executed according to the timetable established in the program?
- ***Activity monitoring:*** Are the projected activities being planned and executed as established in the timetable of the project?
- ***Product Monitoring:*** Are the products (intermediate and final) being developed in a sequential and ordered way?
- ***Results monitoring:*** Is the project fulfilling the required goals established in the impact and outcomes indicators?
- ***Risk monitoring:*** Are there any emerging risks that might jeopardize the correct implementation of the Project? Are risk mitigation actions applied?

Among others, the assessment framework should include:

- A description of the methodology or design of the assessment strategy. The methodology must consider qualitative and quantitative measurements.
  - Data collection protocols, instruments, and related materials.
  - Assessment of relevant performance indicators, including those previously identified in the results matrix, the approach and methodology for calculation and the information and data sources.
  - An updated work plan for the collection, analysis, and production of reports.
  - The table of contents of the report, among others.
- ***Stakeholder Interviews and Data Collection:*** Conduct focus groups interviews and collect data from all key stakeholders, including members of all technical units directly involved in the execution of the program, such as: i) Central Executing Unit (CEU); ii) Procurement Unit; iii) Budget Unit; iv) Central Information Technology Office (CITO); v) Internal Audit Unit; vi) Ministry of Public Service, vii) Ministry of Finance and Economic Transformation (MoFET); viii) other Consultants (firms or individuals) contracted to implement a product or outcome of the project, such as the University of Belize (UB) and; ix) IDB officials involved in the execution of the program.

- **Identification of Implementation Challenges and Risks:** Identify and analyze the critical factors in the program implementation (both positive and negative) that have affected program’s outputs and outcomes, including those that were outside the Executing Agency’s control and as such were associated with the main risks the project faced. Indicate if these risks were identified during program preparation or execution and in both cases, explain how they were managed.
- **Analysis of Externalities:** Identify and analyze positive and negative externalities generated by the SPEM Program, and how are these to affect or have affected the achievement of results.
- **Analysis of the Theory of Change:** Analyze the validity of the anticipated links between the project’s outputs, intended outcomes and impacts against the policy objective, and try to provide evidence of whether the expected links between outputs, and outcomes/impacts are expected to occur in accordance with the policy objective. In addition, the Consultant should complement this analysis with a “theoretical attribution” assessment based on the causal chain that summarizes the determinants of the links between outcomes and outputs.
- **Documentation of Unintended Results:** Identify possible unintended results/outcomes to date deemed significant and consequential for the project, and document them as appropriate.
- **Assessment of Monitoring & Evaluation (M&E) Systems:** Determine the extent to which data were collected using appropriate collection methods to ensure data quality, and the extent to which the project’s M&E plan was implemented and how results were used to inform decision making in the CEU and MOF; and/or resource allocation.
- **Identification of Lessons Learned:** Identify specific lessons learned that can be used in the design and execution of future operations. Classify lessons according to principal issue, for example, institutional capacity, environment, sustainability, risk management, etc.

#### 4. KEY OUTPUTS/DELIVERABLES

The consultancy will require the submission of the following deliverables, subject to the Bank’s and the Executing Agency’s approval.

No.	Deliverables	Working Days
1.	<p><b>Work Plan</b></p> <p>The Work Plan proposal shall include methodology, work schedule, and proposed structure for the Final Report of the Midterm Evaluation. The consultant must propose the structured to be used for the presentation of the final evaluation document, which will be reviewed and approved by the project coordination team and the IDB.</p>	5

2.	<b>Draft Mid-Term Evaluation Report</b> Preliminary Report of the Midterm Evaluation: The consultant must prepare a preliminary version of the midterm evaluation report and submit an electronic copy to the Project Manager by the date established in the work schedule.	15
3.	<b>Final Mid-Term Evaluation Report</b> Final Report of the Midterm Evaluation: The consultant must prepare the final version of the midterm evaluation report and submit two electronic copies — one in PDF format and one in Word — to the Project Manager within the final deadline established in the work schedule.	20
	<b>Total</b>	<b>40</b>

### **Knowledge and Technology Transfer**

- The consultant must transfer to the Project team, in a documented manner and during the term of the contract, the knowledge related to the principles, techniques, processes, procedures, and tools inherent to the execution of the contract, when applicable.
- To this end, approaches will be adopted to ensure the transfer of knowledge, both during the phase in which the Project team is assisted by the consultant and during the phase in which they are expected to carry out their activities independently.
- When applicable, the transfer will be carried out through training to be delivered by the hired consultant and through the documentation produced during the execution of the contract. In such cases, the consultant must include in their work proposal — consolidated in the work plan — the strategy for carrying out the knowledge transfer.
- The consultant may not publish or use, in whole or in part, any information resulting from their work without the express authorization of the CEU.

## **5. QUALIFICATIONS AND EXPERIENCE**

### **Academic Qualification: (submit relevant attestations)**

- Minimum of a Bachelor’s Degree in Public Financial Management, Public Policy, Project Management, Economics or similar.
- Master’s degree or higher in Public Financial Management, Public Policy, Project Management, Economics or similar. (Preferred)

### **General Experience**

- A minimum of eight (8) years of general professional experience dealing with general assessments, projects, stakeholder engagements or related fields.

## **Specific Experience**

- A minimum of five (5) years of experience in conducting evaluation of projects;
- At least two (2) years of specific experiences in evaluating development programs linked to public sectors or public financial management.
- Experience working with IFIs (IDB, World Bank, CDB, etc) would be an asset;
- Experience working in the Caribbean (Belize is a plus).

**(Detailed documentation of relevant projects undertaken, including scope, outcomes, and duration are required)**

## **Desired Skills, Knowledge, and Abilities**

- Demonstrated ability to assess complex situations in order to concisely and clearly filter critical issues and draw conclusions, and excellent facilitation skills.
- Forward-thinker with excellent strategic and analytical skills.
- Proficiency in Microsoft applications including Word, Excel, PowerPoint, MS Project etc.
- Fluency in written and spoken English is required (provide proof if not native language e.g. a secondary school transcript, TOEFL – 75 iBT or higher, IELTS - 6.0 or higher, PTE – 60 or higher, Duolingo 105 or higher, SAT– 500 or higher, ACT – 19 or higher, B2 or higher).

*Applicants are encouraged to ensure that the materials submitted are comprehensive and tailored to demonstrate their capacity to fulfil the objectives of this Terms of Reference.*

## **6. REPORTING RESPONSIBILITY**

- The consultant will report directly to the MOF’s designated project manager. Regular progress updates and review meetings will be required.

## **7. PAYMENT SCHEDULE**

The estimated budget for consultancy is **US\$80,000.00**, inclusive of the consultancy rate, travel and per diem. For international applicants a total of three (3) trips to Belize are required from his or her place of residency to perform the work, as follows: one (1) for the inception mission; one (1) for gathering additional data and concluding the draft report; and one (1) to present the results of the review. A lump sum will be provided to cover in-country travel. The consultant will be responsible to arrange all transportation and other logistics.

<b>Deliverables</b>	<b>Estimated Due Date</b>	<b>Payment %</b>
1) Work Plan	Within 2 weeks from contract signature	20
2) Draft Mid-Term Evaluation Report	As per schedule in the approved work plan	30
3) Final Mid-Term Evaluation Report	Within 7 working days following the presentation	50
<i>Payments will be made upon satisfactory submission and approval of each deliverable.</i>		<b>100%</b>

## **8. DURATION**

It is expected that the consultancy will require a total of 40 non-consecutive days within a period of four (4) months starting **September XX, 2025, and finishing December 30<sup>th</sup>, 2025.** If from a country other than Belize, the consultant shall plan to spend the necessary time in Belize to efficiently and effectively execute the above-described deliverables.

## **9. CRITERIA FOR SELECTION**

The selection for this contractual position will be in accordance with the procedures set out in the Inter-American Development Bank: Policies for the Selection and Contracting of Consultants financed by the Inter-American Development Bank GN-2350-15 and the Government of Belize procurement policies and best practices and is open to all eligible candidates as defined in the policies. The Consultants will be selected based on qualifications including a positive professional reference check.

## **10. APPLICATION PROCEDURES**

Applications should be submitted in the English language before or on **August 22<sup>nd</sup>, 2025, 10:00 a.m. (Local Belize Time).** **Late applications will not be accepted.** Please note that the required application template should be utilized. The Template can be obtained online at <https://procurement.gov.bz/opportunities/>

Applications should be submitted in one (1) pdf document via email to [procurement@ceu.mof.gov.bz](mailto:procurement@ceu.mof.gov.bz) or three (3) hardcopies to the below address:

**Sr. Procurement Specialist  
Central Executing Unit  
Ministry of Finance  
2<sup>nd</sup> floor Sir Edney Cain Building  
Belmopan, Belize**

**Ref: Technical assistance in conducting a Midterm Review of the Strengthening Public Expenditure Management (SPEM) Project in Belize - Your name**