ANNEX B

TERMS OF REFERENCE

PUBLIC SERVICE ANNOUNCEMENT FOR:

Summary

Title	Institutional consultancy to support Ministry of Finance, Economic Development, and Investment Promotion in carrying out Education Public Expenditure Review (PER)
Purpose	To support the MoFEDIP in conducting Education Public Expenditure Review (PER) of the education sector to help assess bottlenecks around budgeting processes including assessment of timeliness of release of funds and utilization by MoPSE.
Location	National
Duration	130 days over 8 months
Start Date	1 April 2025
Reporting to	Education Manager

Background

The Education Public Expenditure Review (PER) serves as a critical diagnostic tool, providing stakeholders with insights into the state of Education Financing in Zimbabwe. Education financing supports the implementation of education policies by covering essential inputs, such as teachers' salaries and their professional development, school infrastructure, and teaching and learning materials, including ICT tools and assistive devices for children with disabilities. While the availability of financial resources alone does not ensure quality education, achieving quality education is impossible without sufficient funding.

Strategic uses of education expenditures can significantly enhance learning outcomes, particularly when resources are directed towards inputs that directly benefit students or address challenges prevalent in low-income settings. However, it is critical for policymakers to carefully assess the conditions required for these inputs to effectively translate into learning gains. Misallocation of resources to factor with only marginal impact on learning can result in wasted investments, undermining the potential benefits of education spending.

This exercise aims to review and assess the efficiency, effectiveness and equity of education expenditures in Zimbabwe, evaluating their adequacy and sustainability in relation to the country's educational goals. Although, education financing in Zimbabwe has been growing in leaps and bounces, it still faces challenges, including consistently failing short of the 20% Dakar financing benchmark issues with weak budget utilization, and persistent equity concerns.

The last Education Public Expenditure Review for Zimbabwe, conducted in October 2016 led by the World Bank, highlighted several critical challenges within the country education sector:

1. **Limited Fiscal Space:** the public budget has insufficient fiscal space for financing nonpersonnel costs, such as learning materials, infrastructure, and school maintenance, which are essential for quality education delivery.

2. **Ineffective Equalisation Mechanism:** there is lack of an effective system to ensure that less well-resourced school receive adequate financing support, leading to disparities in the quality of education across different regions.
3. **Low Investment in Early Education:** Investment in infant and junior education, particularly at Early Childhood Education, is relatively low compared to secondary education. This underinvestment trend has resulted in deficits in infrastructure and shortage in qualified teachers, which are crucial for laying a strong education foundation.

These challenges contribute to significant inequalities in educational opportunities and resource availability, which in turn lead to unequal learning outcomes across the country. Addressing these issues is vital for improving the overall quality and equity of education in the country.

Key policy recommendations from the Public Expenditure Review (PER) 2016 for Zimbabwe's education system, include:

1. Gradually increase fiscal space within the MOPSE budget for non-personnel expenditures to improve resource allocation for critical education inputs.
2. Ensure timely release and effective execution of budgeted funds to avoid disruption in education service delivery and enhance overall financial efficiency.
3. Develop and implement an equalization mechanism to provide adequate resources to underfunded schools, ensuring equity in education quality across all regions.
4. Rebalance public funding available across different levels of education, to ensure equitable support for Early Childhood Development (ECD), primary and secondary education.
5. Implement targeted interventions to expand ECD coverage particularly in underserved and marginalized communities.
6. Promote data transparency through EMIS and establish partnerships with external organizations to foster innovative solutions for sectoral challenges.

Objective of the Public Expenditure Review (PER)

The objective of the Education Public Expenditure Review is to take stock of the education spending in the country, focusing on assessment of the efficiency, effectiveness, and equity of expenditures on education and adequacy and sustainability relative to the country's educational goals and identify potential areas for reform to informed policy decisions and increase the efficiency spendings. The general objective will be pursued through the following specific objectives:

1. Conduct a comprehensive and inclusive review of the public expenditure involving the key stakeholders and assess alignment of the performance-based budget spending for policy priorities in the education sector plan.
2. Identify the key spending patterns including the allocation, utilization, effectiveness and efficiency of resources in the sector.
3. Review and assess the public spending in education sector, providing justification or critique based on results achieved particularly in the areas of resource reallocation to underserved areas, efficient resource utilization, and increased investment in ECD.
4. Provide recommendations on policy and institutional reforms necessary to ensure the efficiency, equity and effectiveness of the education sector spending in the country.
5. Identify opportunities for resource reallocation and implement Results-Based Financing (RBF) mechanisms to enhance public financing in the education sector, particularly for resources mobilisation and allocation to address equity and enhancing access to ECD.

The key expected output of the process is a detailed report on government spending patterns in the education sub-sector, focusing on allocation, utilization, and effectiveness, along with recommendations for improvement. The public expenditure review (PER) will include the following key elements:

1. Detailed report on the public spending patterns for the period of 2017-2023, focusing on allocating resources to underserved areas, enhancing efficiency in resources utilization, increasing investment in early childhood development to improve equity and effectiveness in education spending.
2. Comprehensive descriptive report of public spending patterns in the education sector and sub-sectors, along with strategies for improved coordination and collaboration among key stakeholders in the education sector in Zimbabwe.
3. Identified areas where value for money can be improved and spending efficiency increased with clear justification, focusing on the past expenditures retrospectively in the selected programmes.
4. Set of institutional policy reform recommendations to improve spending efficiency, with clear justifications.
5. Tools and approaches for increased accountability and transparency in education sector spending.

Scope of the assignment

An Institutional consulting firm will be recruited to undertake a thorough review and analysis of public spending patterns in the education sector over the five-year period 2021-2025. Key activities include collecting and analyzing financial data, assessing budget alignment with policy priorities, identifying inefficiencies and areas for improvement. The consultant will also develop recommendations for policy and institutional reforms to enhance spending efficiency and effectiveness. Additionally, the consultant will design tools and approaches to increase accountability and transparency and improved coordination and collaboration among key stakeholders in the education sector. A comprehensive Public Expenditure Review requires the following initiatives:

1. **Understanding the context and motivation:** Understand the country context and motivation of the Public Expenditure Review (PER). The possible scenarios which may direct the PER team to a particular path.
2. **Securing access to data and information:** Identify available financing and non-financing datasets as well as policy and legal documents. This includes obtaining data on budget allocations, expenditures, financial accountability, and education outcome as well as any existing studies or reports related to education sector, in collaboration with. Depending on data availability, the scope may need to be modified.
3. **Analysing data and information:** Assess the country's education finance system, financial accountability, adequacy and sustainability, efficiency and effectiveness, and equity of education financing. This analysis should involve evaluating budget allocations and expenditures across multiple level of education, identifying gaps or inefficiencies in resource utilization, and assessing whether the current financing system meets the country's education goal. It should consider how well the financial system supports equitable access to quality education the underserved population, to inform strategic recommendations for improved and effective education financing in the country.
4. **Validating key findings and policy recommendations:** Discuss and validate key findings and policy recommendations with main stakeholders. This should include organizing separate sessions for in-depth discussion technical staff from the Ministry of Finance, Economic Development, and Investment Promotion (MoFEDIP) and Ministry of Primary and Secondary Education (MoPSE), ensuring that technical aspects are thoroughly reviewed. Additionally, organize sessions with policymakers to align recommendations with strategic objectives and ensure that proposed policies are contextually relevant and actionable. Feedback should be incorporated to refine the final report, ensuring accurate, relevant, and aligned with the ESSP.

5. **Presentation of the report to the Education Coordination Group (ECG):** Discuss and present the findings and recommendation in the Education Coordination Meeting which brings together the MoPSE, MoFEDIP, other line ministries, departments and agencies, UN agencies and representatives of CSOs and teacher unions. The presentation will include a detailed review of the data analysis, key findings, and proposed policy recommendations. Following the ECG meeting, the final report will be refined based on the feedback and then published on the MoPSE and MoFEDIP website. 1000 printed copies of the report will be distributed among key stakeholders, at national and subnational level, schools' communities.
6. **Disseminate the final report:** The final report will be widely disseminated to ensure that its findings and recommendations reach all relevant stakeholders. This includes internal stakeholders such as subnational level structures, Provincial and District Education Offices and schools. In addition, the report will be shared with all education partners including government ministries, development partners, civil society organizations, teachers, and parent associations. The dissemination plan will involve not only the distribution of the report in print and digital formats, also through workshops or meetings to present the findings, facilitate discussions, and ensure that the insights are understood and actionable at all levels.

Justification

A Public Expenditure Review aims at evaluating the efficiency, effectiveness, and equity of public resource allocation in government sectors, including education. It helps policymakers to assess whether financial resources are being utilized in alignment with national priorities and whether they are delivering intended outcomes. In the education sector, PERs are valuable for ensuring that investments lead to improved learning outcomes, greater access, and systemwide performance enhancements. Some of the main justifications for conducting a PER include:

1. Assessing alignment with national priorities: A PER evaluates whether education spending is aligned with national development goals, policy priorities, and global commitments like SDG4, ensuring that public funds support strategic educational objectives.
2. Improving efficiency of resource allocation: A PER, through efficiency and effective analysis, can help optimize resource allocation, ensuring that financial investments are directed toward areas that deliver the highest return in terms of educational outcomes.
3. Enhance accountability and transparency: Conducting a PER fosters greater accountability by providing a clear overview of how public funds are used. This promotes transparency, enabling stakeholders to monitor and evaluate the effectiveness of education spending.
4. Promote equity in education: A PER highlights disparities in the distribution of education resources, ensuring that funding reaches underserved populations and marginalized communities, thereby fostering greater equity within the education system.
5. Support evidence-based decision making: Provides data-driven insights and recommendations, helping governments make informed decisions on education financing reforms and investment strategies that enhance the overall impact of public expenditure.

Academic and other requirements

QUALIFICATIONS, SPECIALIZED EXPERIENCE AND ADDITIONAL COMPETENCIES

The assignment requires a highly motivated and competent institutional contractor with local expertise. Technical competency and experience in developing similar documents in and outside the country will be a prerequisite. The firm will be required to have an economist or public financial expert as team leader with an excellent track record of work in public finance management. The overall qualifications for the institution are:

- At least 15 years' experience in education research, five of which should be in international developing country context, with experience in education finance systems in low-income, resource constraints and equity challenges are more pronounced.
- Strong track record in evaluating complex national level education programmes in developing countries.
- Proven experience and technical competencies in the use of participatory, qualitative, and quantitative assessment and analytic methods.
- Proven track record of producing excellent analytic reports.
- Previous experience working with a variety of stakeholders (government, development partners, civil society).
- Strong preference for previous experience with the Zimbabwean education context
- Previous experience of Working with an UN organization is an asset.
- Previous experience in Education Sector Analysis or related studies is required.

The team should include an identified team leader, with the following qualifications:

- Master's degree in education, economics, social sciences, or a related field
- At least ten years of experience in education planning, analysis, and/or evaluation, with a preference for someone who has previous experience leading reviews of Public Expenditure Reviews

- At least two years of experience leading teams in education-related evaluations or projects and experience in building local capacity for managing and analyzing education expenditures, to ensure sustainable improvements.
- The team should explicitly include a member with extensive experience in Public Finance Management particularly in education sector, with expertise in analysing government budgets, expenditure tracking, financial accountability and fiscal sustainability.
- Proven ability to engage and work with a variety of stakeholders (government, development partners, civil society)
- Excellent oral and written communication skills in English, with proven report writing skills.
- Good interpersonal skills and ability to support multi-disciplinary teams in a multi- cultural environment.

Members of the team should also have the following qualities: one team member (including the team leader) may fulfill more than one of these qualifications:

- At least one team member who is a national from Zimbabwe and able to speak Shona and/or Ndebele language, and with strong familiarity with the Zimbabwe education system.
- At least one team member with proven quantitative and qualitative data analysis skills and especially demonstrated experience with education statistics and experience designing evaluations approach and methodologies.
- At least one team member with proven ability to provide financial/resource analysis, including review of government budget and expenditure.
- At least one team member with minimum 3 years' experience in inclusive education, especially with a focus on gender equality and children with disabilities.

Expected deliverables and payment terms.

Partial payment will be done upon accomplishing the tasks and milestones and deliverables set in the table below.

The contractor is required to submit the following deliverables:

Deliverable	Timeline from signature	Amount
1. Inception report detailing the methodology to be used and roadmap (work schedule, structure of the report and timeline)	20 days By end of April 2025	20%

Deliverable	Timeline from signature	Amount
2. Draft Public Expenditure Review document highlighting at least the following components: a) Policy and regulatory framework for public spending. b) Institutional arrangements and key actors, including relationships between actors. c) Public expenditure in education, including sources of funding, shares, and growth rate for the sources of funding. d) Comparison of budget allocation, release verses actual expenditure e) Public spending on children as a ratio of sector spending f) Efficiency and effectiveness of the education sector and sub-sector budgets. g) Fiscal space and practices for enhancing the education sector budget. h) Best practices, lessons learned and challenges. i) Recommendations for improved budgeting, management, and accountability in education sector funding.	50 days By end of June 2025	30%
3. Presentation of the report (including PowerPoint) to the Education Coordination Group (ECG), key stakeholders such Finance, Health, Education, Infrastructure, Social Welfare, and Agriculture, UN agencies, CSOs, and teacher unions. 4. Refined second version shared incorporating feedback/ comments/amendments. 5. Validation of the report by UNICEF and the government, MoPSE and other key stakeholders.	20 days By end of August 2025	20%
6. Final Report includes: a) Adequately edited and cleaned version, including a 1-pager summary of findings in infographics. b) List of persons interviewed. c) Standard detailed tables showing budget trends, d) Data sources and a PowerPoint presentation of the report.	40 days By end of September 2025	30%
Total	**130 days**	**100%**

Evaluation and Criteria

A technical proposal must include a detailed technical description of the methodology to be used for the work described above, together with a proposed timeline, description of key stages to be carried out and an activity chart (GANTT chart).

A financial proposal must be submitted separately in a separate email from the Technical proposal.

OVERALL RESPONSE	Mark
Understanding of UNICEF's needs and responsiveness to the requirements	5
Understanding of scope, objectives, and completeness of response	5
Sub Total	**10**
Institutional profile	
Institutions must provide details of qualification, samples of reports on similar analyses, and a work profile of the team leader and other team members. For institutions NOT based in Zimbabwe, they will be required to include in their team a local consultant. Any local consultant will be a reputable professional or firm based in Zimbabwe. • The team should meet the following minimum criteria: At least 15 years' experience in education research, five of which should be in international developing country context. • Strong track record in public finance analysis • Strong track record in evaluating complex national level education programmes in developing countries • Proven experience in the use of participatory, qualitative, and quantitative assessment and analytic methods. • Proven technical competence in quantitative and qualitative data analysis. • Proven track record of producing excellent and reader-friendly analytic reports.	10
Sub Total	**10**
Key personnel & technical competency	

• A team leader with at least a master's degree in education, economics, social sciences, or a related field • At least ten years of experience in education planning, analysis, and/or evaluation, with a preference for someone who has previous experience leading reviews of Public Expenditure Reviews • At least two years of experience leading teams in education-related evaluations or projects and experience in building local capacity for managing and analyzing education expenditures, to ensure sustainable improvements. • The team should explicitly include a member with at least 5 years' experience in Public Finance Management particularly in education sector, with expertise in analysing government budgets, expenditure tracking, financial accountability and fiscal sustainability. • Proven ability to engage and work with a variety of stakeholders (government, development partners, civil society), • Excellent oral and written communication skills in English, with proven report writing skills. • Good interpersonal skills and ability to support multi-disciplinary teams in a multi-cultural environment.	10
Strong familiarity and experience with Zimbabwe education system including ability to converse in local languages especially Shona and or Ndebele	5
Proven quantitative and qualitative data analysis skills, and especially demonstrated experience with education statistics public finance data and experience designing evaluations approach and methodologies	5
Proven ability to provide financial/resource analysis, including review of government budget and expenditures, external aid and previous experience in Public Expenditure Review.	5
Experience in inclusive education, especially with a focus on gender equality and children with disabilities	5
Sub Total	**30**
Methodology and Approach	
- Quality of proposed approach/methodology.	**10**
- Quality/soundness of the Proposed Implementation Plan, i.e. how the institution will undertake and execute the work assignment.	**10**
Grand Total	**70**

The Technical Proposal will be scored out of 70% while the Financial Proposal will be scored out of 30% to get a total of 100%. Only proposals that score 70 percent of the 70 (49 points out of 70) will proceed to the next stage of financial evaluation).

General Conditions: Procedures and Logistics

Policy both parties should be aware of:

- No contract may commence unless the contract is signed by both UNICEF and the Contractor.
- No member of the contracting company may travel prior to the contract agreement and signature. Zimbabwe Country Office requesting Sections is responsible for all costs related to travel and related to the required assignment.

- Members of the contracting company will not have supervisory responsibilities or authority on UNICEF budget.