



**TERMS OF REFERENCE  
FOR MID TERM REVIEW  
OF THE STRATEGIC PLAN 2020-2024**

**APRIL 2023**

## 1.0 BACKGROUND AND CONTEXT

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### 1.1 General

REPOA is an independent research institution established in 1994 to facilitate socio-economic transformation for inclusive development through knowledge creation and utilization. At the time of its establishment, REPOA's mandate focused on supporting poverty eradication initiatives through capacity building in policy research. Over time, this mandate has evolved to include active engagement in dialogue and policy development to enhance economic growth and socio-economic transformation for inclusive development. This is done through the production of high-quality research, targeted training, knowledge sharing and providing evidence to informed policy development and intervention design. The strategic compass for the definition and realization of organizational goals and objectives has been organised around a series of medium term, five-year strategic plans. These plans have guided REPOA's evolution and adaptation to the policy and financial environment as well as steered relevant research agenda and methods of engagement to meet strategic objectives and outcomes.

Historically, there have been six distinct phases of the strategic plan since REPOA's inception in 1994. While each plan has had a distinct overarching objective, the plans have also been notable for successive incremental improvements and modifications to their predecessors. The current iteration of the strategic plan (2020-2024) reflects lessons learned from its predecessors and aligns REPOA's core business to Tanzania's socioeconomic priorities as defined in, among others, the National Development Vision 2025, the Long-Term Growth Perspective Plan 2010/11-2025/26, commitments to regional and global development compacts, as well as the evolving global policy and operating environment for development think tanks. REPOA's current strategic plan intends to support Tanzania's and East Africa's efforts towards meeting key national objectives and designing policies and stimulating action in line with the five (5) interdependent critical elements for sustainable development, namely people, prosperity, peace, planet, and partnerships. The current REPOA strategic plan is organized in three interrelated strategic research areas, capitalizing on synergy and complementarity among them to generate knowledge on appropriate processes of socioeconomic transformation. The areas are:

- **Productive Sectors and Inclusive Development:** Research under this theme intends to examine transformation process and the contribution of productive sectors in that process, and how it impacts on inclusion of the population through employment, incomes, and wellbeing. It examines linkages between

natural resources such as the extractives and agriculture with manufacturing and services, and how the country could deepen and scale up productivity gains and promote national competitiveness.

- **Gender and Human Development:** Under this theme, the focus is on research that supports the development of policies and strategies for sustained poverty reduction, distributive and redistributive economic development and transformation. Such policies and strategies must focus on the most disadvantaged, and on the underlying drivers of disadvantage entrenched in gender, geographical location, age and/or other identity-based inequalities. Research also examines approaches to the provision of key social services including health, education, and water in ways that pays attention to quality, access, and gender differences in developing human capability and growth.
- **Governance, Accountability and Citizen Engagement / Participation:** Research under this theme is intended to inform national and local economic governance policies and processes to ensure that they bring with them inclusive development and improved service delivery, with attention to resource governance issues (physical, human and financial resources) and broadening of citizen participation in the development processes. We aim to produce rigorous evidence regarding appropriate approaches for improving key aspects of governance – service delivery performance of public sector institutions, transparency, responsiveness, equity, effectiveness, efficiency, downward accountability, and local economic development.

The pursuit of these thematic areas is complemented by two (2) cross-cutting themes on environment and climate change, as well as Technology, Innovation & Data Management that highlight broader but very transformational policy issues.

The implementation of the 2020-2024 Strategic Plan has been defined by four broad sets of activities:

- i. **Undertaking of Research:** This has long defined REPOA's existence. Since 2020, primary research has focused on the five aforementioned thematic areas involving both strategic and collaborative projects in response to evolving policy demands in Tanzania and within the region.
- ii. **Strengthening Capacity for Policy Research** REPOA has revived its research capacity building programme under the Open Competitive System (OCS) since 2020. This has been done on competitive basis, with REPOA identifying thematic areas of focus, inviting proposals and supporting implementation of research, peer reviews, and platforms for

sharing of research findings to early and mid-career researchers in Tanzania. This effort also includes tailor-made trainings on research methodologies, data analysis, and writing skills, and mentoring by senior researchers, including possibilities for joint publications in refereed journals.

Equally important target for tailor-made training are research users. In the past, REPOA has offered trainings on budget analysis and public expenditure tracking surveys (PETS) for local government officials, councilors and CSOs working at the local levels. In recent years, REPOA has also responded to capacity needs in policy analysis by designed and providing trainings on Evidence Informed Policy Making (EIPM) that has targeted policy analysts and relevant officials from MDAs and Parliamentary officials since 2020.

- iii. **Dissemination and Utilization of Research Findings:** Dissemination of research findings and facilitation of utilization have remained critical in bridging the gap between research and policy. Under the current strategic Plan, REPOA has continued to rely on various dissemination methods including the publication of research reports, publication of policy and project briefs, dissemination workshops, press releases, and participation in forums organized by other stakeholders. Further, the outbreak of Covid-19 spurred investment and use of enhanced virtual dissemination of outputs through podcasts, moocs (massive open online courses) and social media channels. REPOA has also continued to organize and host, Tanzania's largest policy and research platform, the Annual Research Workshop (ARW).
- iv. **Policy Analysis and Dialogue:** The 2020-2024 Strategic Plan has encouraged enhanced visibility and participation in policy analyses and public policy dialogues. REPOA has continued to support the development of national policies and participating actively in special teams formed by the Government to formulate various policies and strategies, such as the Third Five Year Development Plan, National Private Sector Development Policy, and the National Decentralisation Policy. REPOA has remained active in policy development and dialogue processes with both the government and other non-state actors including the National Development Vision 2050 Drafting Team, National Multidimensional Poverty Working Group, National Climate Change Alliance, Agriculture Policy Analysis Group, Eastern Arc Mountain Conservation Endowment Fund, to name a few.

## 2.0 PURPOSE

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These Terms of Reference present requirements of the Midterm review of REPOA's Strategic Plan, 2020 - 2024. The aim of this exercise is to assess the achievements made by REPOA in relation to the strategic objectives for the first half of the implementation of the plan, contributions made, or results achieved through outputs coming from its work, outcomes, and where possible contribution (impact) to policy decisions and practices on the deliverables so far. In other words, the midterm review aims to assess the extent to which the strategic aims and objectives have been achieved and whether the achievement is reflective of the time used and resources. The results of the mid-term review will contribute to promote accountability for performance, inform what should be adjusted to stay on course for the remaining period of implementing the strategic plan. The review is expected to deliver lessons across all four outcome areas for informing the preparation of the subsequent strategic plan.

The main guiding questions are:

- To what extent have the activities and targets spelled out in the Strategic Plan 2020-24 been implemented?
- Does the level of implementation reflect the time and resources spent so far and whether they have been used efficiently and effectively in contributing to the achievements of objectives?
- Are the current thematic areas of REPOA's research work relevant in the context of the trajectory of Tanzania's development and major trends around the globe?

## 3.0 SCOPE OF WORK

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The scope of this review will embrace all REPOA's spheres of work and activities as reflected in the strategic plan's results framework below:

<b>Results</b>	<b>Indicators</b>
<b>Output 1:1</b> Research reports	# of research reports produced.
<b>Output 1:2</b> Policy briefs	# of policy briefs published
<b>Output 1:3</b> Working papers	# of working papers produced

<b>Output 1:4</b> Journal articles	# of journal articles produced
<b>Output 1: 5</b> Books	# of books produced
<b>Output 1: 6</b> Book chapter	# of Book chapters and other publications produced.
<b>Outcome1:7</b> Increased collaboration with the government, research institution and academic to improve policies and generation knowledge.	# of technical assistance or advisories requested to offer the support to the government.
<b>Outcome 1:8</b> Increased demand for evidence research, including our expertise to address socioeconomic policy issues.	# of Invitations received from other institutions to our research thematic areas.
<b>Outcome 1:9</b> Targeted plans and policies implemented to support women in socioeconomic empowerment.	# of gender policy reviews/development/works conducted with REPOA association or reference.
<b>Outcome 1:10</b> REPOA involved in policy and strategy reviews and plans	# of collaborative strategies, plans and policy reviews that REPOA involved with the government.
<b>Output 2:1:</b> Conducting trainings.	# of trained researchers
	# of trained research users
<b>Output 2: 2</b> Mentoring/coaching programs	# of research proposals approved
	# of OCS seminar conducted
<b>Output 2:3</b> Recruited Research fellows/Associates	# of evidence produced collaboratively with associates
	# of research evidence produced in collaboration with research fellows
<b>Outcome 2:4:</b> Increased external demand for REPOA training, collaborations & Internships	# of collaborative work/projects with relevant partners implemented per year.
	# of employed interns with REPOA and who managed to produce policy evidence
<b>Outcome 2:5</b> Increased use of research-based evidence in policy analysis and policy development.	# of consultation and policy review requests from the Government.

<b>Outcome 2:6</b> More understanding of research and reporting research findings on the media more accurately.	# of feature articles in media mainstreaming our research
<b>Outcome 2:6</b> Increase number of women into research policy activities and knowledge.	# of REPOA women researchers capacitated and involved in research works for policy development.
<b>2Output 3:1</b> Media sessions & Workshops	# of Media engagements
	# of Media programmes
	# of promotional materials including online e-briefs
<b>Output 3:2</b> Policy dialogue, open sessions and dissemination events	# of dialogues conducted and attributed to REPOA research findings.
	# of open session conducted and attributed to REPOA research findings.
	# of policymakers participated dissemination processes
	# of non-policymakers participated dissemination processes
<b>Output 3:3</b> Policy review task and technical teams	# of financial statements and audit reports
	# of governance meetings conducted per year.
<b>Output 3:5</b> Strategic Partnerships	Proportion of annual budget funded by strategic core partners and long-term research programmes.

The review will in particular analyse and assess the following:

**i) The Effectiveness of the implementation of the plan**

In determining the level of achievement, the midterm review shall assess the results and progresses of the Strategic Plan in terms of how effective the approaches and activities are in leading to the intended outputs and outcomes versus planned outputs and outcomes. It will also look at the capacity of REPOA staff in undertaking research, supporting policy reviews, policy formulation and implementation, and dissemination of the research findings and networking.

The review shall therefore:

- Assess the main factors in operations and management that have facilitated or impeded the programme in achieving the intended objectives.
- Review REPOA's systems for budgeting and financial management and assess whether these are in line with international standards.
- Assess the HR and other administrative systems to ensure that they are according to the best practices in the industry.

**Main Questions:**

- To what extent has the capacity of researchers and research users (i.e. those participating in policy processes) been developed? This is evaluated against planned outputs, purposes and goals of REPOA.
- To what extent has the communication strategy enhanced awareness on the knowledge created?
- Is the current governance and operational structure of REPOA and human resource plan flexible enough to allow for smooth implementation and completion of the strategic plan?
- What are the reasons for the achievements or non-achievements of objectives?

**ii) The Efficiency of REPOA's Work**

The review shall also assess the results achieved against resources used (value for money). It should assess whether REPOA's systems and processes (including budgeting, financial management information and decision-making structures) enabled REPOA to ensure that resources are used efficiently.

**Main Questions:**

- Has the implementation of strategic plan been reasonably efficient given its resource envelope?
- Were the strategies and activities implemented economically worthwhile, given possible alternative uses of available resources? Could the resources allocated to various activities have been used for other, more worthwhile purposes in relation to REPOA's mandate?

**iii) Influence and Impact**



The review shall measure all significant effects of research products and communication of research findings, positive or negative, expected or unforeseen, on targeted stakeholders of social economic transformation and poverty reduction policies/initiatives. As there are multiple factors and players in influencing policy changes or reviews it is not feasible to have a direct association of what happens in policy changes to REPOA research products. However, there are incidences where research findings could have influenced a stage in the policy continuum. Through either outcome harvesting or tracking backwards the midterm review process shall try to establish any possible contribution to policy development, implementation, and reviews.

**Main Questions:**

- a) To what extent have the resulting research products influenced policy practices in the period of implementation of the Strategic Plan?
- b) In terms of socio-economic transformation and poverty reduction, is there any element of change which may have been influenced in one way or another by our research products? What could that be? This can be evaluated against dissemination of the findings through REPOA multiple channels including seminars, presentations to targeted groups, involvement of REPOA staff to policy making bodies etc.
- c) Have the results achieved contributed to the overall goal of social economic transformation and poverty reduction efforts?
- d) What do stakeholders consider as the more effective engagement channel or method when it comes to dissemination of REPOA's work.
- e) To what extent can changes in stakeholders' capacity to undertake policy design and implementation be attributed to the capacity development, knowledge creation and communications interventions by REPOA? What would have occurred without such interventions?
- f) Have there been unintended consequences from any of REPOA's activities?
- g) What could REPOA do more to influence policies?
- h) What areas of the current thematic research programme should continue in the next strategic plan?

**iv) Sustainability**

The review should assess the sustainability of REPOA to implement the strategic plan and beyond i.e., how REPOA is going to respond challenges to continue to be relevant. The review shall answer the following question:

How are the current resource mobilization approaches effective in ensuring that REPOA is sustainable? What more could be done to ensure REPOA has enough resources to complete the remaining part of the Strategic Plan and ensure a smooth transition to another medium-term strategy.

**v) Lessons Learnt and Recommendations**

The review shall draw key lessons and provide recommendations for completing the current strategy and in formulating the subsequent strategy. The review shall answer the question:

How should REPOA improve on opportunities and its strengths to realize her mandate (such as leading debate on socioeconomic transformation).

Recommendations should capture the long-term fulfilment of REPOA's mission through advice on how key operational challenges can be dealt with.

## **4.0 THE REVIEW TEAM**

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### **4.1 Skills required**

It is highly desirable that the review team should include competent consultants with:

- (i) Knowledge of running research institutes/think tanks,
- (ii) Knowledge of Tanzanian context,
- (iii) Expertise in organisational development,
- (iv) Expertise in outcome harvesting,
- (v) Expertise in financial management, and
- (vi) Experience in carrying out review of a development work or project.

In addition to the requirements stated above, the team is expected to demonstrate overall skills in institutional development and management.

## **5.0 IMPLEMENTATION/METHODOLOGY**

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This review is an important learning process to inform REPOA, her collaborators, development partners and other stakeholders. Various methodologies will be applied during the review, including but not limited to:

- Desk review of relevant REPOA documents, including Strategic Plan; progress/performance reports Annual Plans, Publications (in local and international journals), Media coverage, Annual reports, various policies/framework/strategy papers for focus areas, monitoring and review frameworks, performance indicators, guidelines, tools and training programmes and activities and other relevant documents.
- The process will also benefit from conducting open discussion and interviews or questionnaires with the following proposed stakeholders:
  - (i) Researchers
  - (ii) Other Research organizations in Tanzania

- (iii) Research users (Policy makers, CSOs and Private Sector Representatives)
  - (iv) Media
  - (v) Development partners
  - (vi) Members of the Board of Directors
  - (vii) REPOA's staff
  - (viii) Other relevant groups or individuals as the review team might see it appropriate.
- Group meetings for consultations and validation of findings can be used. These would allow for a better understanding of REPOA's operational environment, the strength, weaknesses, constraints, challenges, and opportunities open in the current Strategic Plan.

## **6.0 TIMEFRAME AND REPORTING**

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The interested consultants/review team will indicate how much time they will need to accomplish the review exercise but should not exceed four months after the signing of the contract. Time schedule shall include all key activities including presentation of the draft and final reports. The review team will report to the Executive Director. The Monitoring and Review Officer will coordinate and facilitate the review process by availing the necessary reports and data.

The assignment is expected to commence immediately after signing the contract and should be completed within the timeframe agreed by both parties.

The consulting team will produce the first draft of the review report at the time to be agreed upon by both parties and discussed with REPOA's Staff and Board of Directors.

The consulting team shall incorporate the inputs from the above stakeholders and present the final report at the time to be agreed and set in the final agreement.

The report shall be written in English and shall have an executive summary outlining major findings, conclusions, and recommendations. The entire report should not exceed 50 pages, excluding annexes.

## **7.0 DELIVERABLES**

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- I. Inception Report<sup>1</sup> to include the understanding of the assignment, methodology, questions, and budget.
- II. Draft report<sup>2</sup> of findings and recommendations
- III. The final report of findings and recommendations

## **8.0 REQUIRED DOCUMENTS IN THE BIDDING PROCESS**

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The following documents shall be sent to REPOA no later than 28<sup>th</sup> May 2023:

- a) The technical proposal responding to the ToRs in this proposal.
- b) The financial proposal to enable the consulting team/firm to deliver on the ToRs.

The review of the proposals assigns a weight of at least 80% to the technical proposal and 20% to the financial proposal.

A bidder shall ensure that its technical proposal is clear and concise and comprehensibly responds to the key ToRs. The technical proposal shall also include CVs of those being proposed for the review work and their respective roles.

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<sup>1</sup> After the initial agreement meeting with REPOA's management, the Review Team will share an inception report detailing the understanding of the assignment; outlining the methodology to be adopted, and tentative schedule of activities.

<sup>2</sup> The draft report presents the analysis of the review issues mentioned in section 3.0. While the main part should present the results in a very concise form, details can be placed in the appendix.

# ANNEXES

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## Annex: List of documents to be reviewed

The following is a list of important documents (and data source) that the reviewers are advised to read at the onset of the review process and before finalising the review design:

- REPOA Strategic Plan for 2020 – 2024.
- Communication strategy
- Review report for the previous Strategic Plan 2015 – 2019
- List of completed and ongoing research products
- List of key stakeholders
- Annual work plans
- Annual Operational and Financial Reports from 2020 to date.
- Key outputs produced, especially research reports.
- Annual Research Workshop reports.
- Financial Policy/Manual.
- Human Resource Policy/Manual.
- Procurement Manual
- Partnership arrangements e.g. agreements of cooperation with Development Partners, etc.
- Newsletters and publicity information.
- Meetings records.
- Monitoring matrices
- Events registers.