

Terms of Reference for the MERL Supplier List

Overview

This document specifies the Terms of Reference (TOR) for the Ministry of Foreign Affairs and Trade (MFAT) Monitoring and Evaluation, Research and Learning (MERL) Supplier List (The List).

MFAT is releasing an Invitation to Qualify for suitably experienced Suppliers to join The List.

Background of The Panel and The List

MFAT will procure MERL services through a small panel of suppliers (The Panel) and through a pre-approved list of MERL specialists (The List). This structure follows extensive review of the previous panel including a need to more effectively and efficiently engage with suppliers and to set clear expectations.

The Panel will be a small group of suppliers that will work closely and build ongoing relationships with MFAT. Suppliers on The Panel will be expected to report on their engagement with The List and will be subject to greater due diligence checks. The Panel are expected to have the capacity and capability to complete projects of larger scope and scale. The Panel will have active relationship management engagement.

The List is a larger, open, pre-approved list with suppliers able to apply at any time, with periodic intakes. The List aims to include a wider group of pacific evaluators and researchers, with the aim of actively supporting and engaging with pacific methodologies and specialists to ensure our MERL delivery is better contextualised and has sustained benefits. The Invitation to Qualify for The List will require a simple two-page response, and is intended for suppliers who are: specialists in one of MFAT's thematic or geographic areas; Māori or Pasifika suppliers; or are based in one or more Pacific country to be involved with the MERL community and opportunities to leverage their skillsets in MERL activities.

The List purpose and objectives

The List contributes to MFAT's organisational learning, transparency, and accountability through providing a diverse and specialised range of consultancy and advisory services

in areas that span New Zealand's humanitarian, development, and diplomatic engagement.

MERL is the basis of MFAT's Pacific and Development Group's (PDG) performance system. MERL provides a systematic approach to gather, assess, manage, and use evidence.

We monitor activities and programmes to assess progress and performance. The data gathered through regular monitoring helps PDG build an overview of our results and inform responsive delivery.

We evaluate activities and programmes to assess the quality and value of our delivery. We approach evaluation by asking whether New Zealand's contributions are relevant to context, coherent with other interventions, achieve the objectives, contribute to outcomes sought, deliver results in an efficient way, and have positive impacts that last.

We ensure that we are learning. We communicate the evidence built through monitoring, evaluation and research clearly and widely to relevant stakeholders through reports and insights products. We seek to continuously add value by drawing on new learning to improve advice, training, and guidelines to PDG.

We will procure and manage these services to achieve the following objectives:

1. **MERL procurement is effective** at engaging external MERL providers to improve accountability and evidence based decision making in the New Zealand International development Cooperation. This effectiveness will be measured through post-evaluation surveys with questions indicating:
 - Improved quality of evaluation and research through The List, and
 - Increased quantity of evaluation and research through The List

2. **MERL Procurement is relevant** to decision makers, suppliers, and communities affected by those decisions. Improved relevance will be indicated by:
 - Increased engagement and support for pacific based suppliers
 - Increased value and adoption of recommendations by MFAT decision makers,

3. **MERL Procurement is coordinated** with clear and constructive relationships between MFAT and suppliers and between suppliers themselves. Improved coordination will be indicated by:
 - Increased and improved engagement with MERL suppliers.
 - Increased and improved engagement between MERL suppliers.

The List scope

The scope of The List will include:

- After the initial intake on GETS, suppliers will be welcome to apply at any time via MERL@mfat.govt.nz and new intakes will be determined every six months.
- The geographic and thematic focus of The List will be the range of locations and thematic areas in which MFAT operates, with a particular focus on the Pacific and specialist thematic areas. We will clarify the geographic and thematic scope in specific Contract for Services.
- The scope of The List will focus on the provision of services related to the MFAT MERL requirements. This may include contributions to programme design, context analysis and policy development where relevant.
- The List is likely to be engaged when:
 - The Panel subcontracts specialist skills and expertise for a particular project
 - MFAT direct contracts a supplier from The List for work under \$100k that The List supplier has outlined as their specialist area(s).

The List deliverables

To deliver these MERL ambitions, we procure expert support in several areas:

- Monitoring and Evaluation Framework Design and implementation support including programme logic; theory of change /action and indicator development; and real-time monitoring for results based management.
- Evaluation: application of different evaluation approaches (e.g. formative evaluation, developmental evaluation, real-time evaluation, outcomes harvesting and rapid reviews); using monitoring and evaluation for adaptive change and management.
- Research: a wide range of multi-disciplinary research (e.g. applied research, policy analysis and literature reviews) commissioned to support evidence informed decision-making.
- Learning to support organisational learning: design of communication/dissemination products, including infographics; capability development, training and mentoring in monitoring and evaluation and research.

The List standards and principles

All MERL processes and outputs are required to be robust and independent (carried out in a way that avoids any adverse effects of political or organisational influence on the findings) and transparent (process open and understood by all parties).

Quality standards

A list of MFAT quality standards for evaluations is presented in Appendix C. These are based on the OECD-Development Assistance Committee (DAC) set of quality standards for development evaluation.

When conducting the evaluation, the evaluation team will comply with the [MFAT Code of Conduct](#)

Culturally responsive methodological approaches

There are a range of world-views and we encourage the use of culturally appropriate MERL designs, methods and approaches to ensure our work contributes to the body of knowledge of the country and its people which are the focus of the MERL activities.

Indigenous expertise and Capacity building

MERL suppliers should value and build indigenous expertise. Capability building through evaluations is key to improving indigenous knowledge outcomes and is a tangible example of reciprocity in action. It demonstrates a commitment to the empowerment of the indigenous community and partner government, and provides an opportunity to build indigenous research and evaluation capacity.

Reporting requirements and supplier engagement

Each Contract for Services will outline specific reporting and engagement requirements. However, broadly, we will manage our engagement and relationship with The List suppliers through the following mechanisms:

MERL supplier engagement - six monthly meetings

We will convene a six-monthly meeting (in March and September every year) that includes both The Panel and The List suppliers to discuss the pipeline of upcoming, known MERL services required. This pipeline will be as comprehensive as possible and will include strategic evaluations, research, and larger activity evaluations. However, there will be work that MFAT commissions within shorter timeframes that will not be included. This meeting will also discuss issues of MERL policy and practice, share learnings, and develop partnerships.

Evaluation feedback forms

Following each individual Contract for Services commissioned through The List, MFAT commissioning staff and suppliers will complete feedback forms to assess performance.

MERL procurement governance and management

If directly contracting with MFAT, The List suppliers will be commissioned via a Contracts for Service will be accountable for their performance to MFAT. MFAT will encourage The Panel suppliers to sub-contract work to The List suppliers where appropriate. This could be for specialist or in-country work.

MFAT's Development Capability and Insights Division is responsible for the day-to-day management and administration of The Panel and The List, including maintaining and updating supplier records, performance reporting, engaging with suppliers on the MERL pipeline and organising supplier meetings.

Transparency

It is MFAT policy to make evaluation reports publicly available (e.g. on the MFAT website) unless there is prior agreement not to do so. Any

information that could prevent the release of an evaluation report under the Official Information or Privacy Acts would not be included in published reports.

Ownership of information

All the key deliverables and the data/information collected will become the property of MFAT.

Contracting

For each MERL service commissioned there will be an individual Contract for Services based on MFAT's standard Terms and Conditions.

Approval

Approved by:

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(signature)

.....
(date)

[name]
Unit Manager / Development
Counsellor, [team name]