

Terms of References

Title of Procurement: Terms of Reference: Documenting Digital PFM Reform Case Stories in Africa

Working period: 40 working days

Location: Centurion, Gauteng, South Africa /Remote

ABOUT US

The Collaborative Africa Budget Reform Initiative (CABRI) is an intergovernmental organization that fosters peer learning and exchange among African ministries of finance, budget, and planning. Our focus areas encompass achieving value for money in public spending, promoting budget transparency for greater accountability and participation, ensuring sustainable public debt management and building institutional capabilities for Public Financial Management (PFM) reform. CABRI brings extensive experience working across various sectors such as education, agriculture, health, extractives, infrastructure, and water, sanitation, and hygiene. In addition, we have been actively supporting African countries in strengthening their digital PFM systems to improve efficiency, transparency, and accountability in the management of public resources. Through collaborative initiatives, CABRI has partnered various countries to identify common digital PFM challenges and develop practical, context-specific strategies to address them.

By fostering peer learning and facilitating the exchange of country experiences, CABRI aims to promote sustainable digital solutions that enhance the performance, resilience, and transparency of public finance systems across the continent. Our collective efforts are geared toward building robust, efficient, and accountable financial management frameworks that support Africa's development goals.

The services to be provided under the assignment:

Call for Service Providers : Development of Case Stories on Digital Public Financial Management (PFM) Reforms in Africa

The Collaborative Africa Budget Reform Initiative (CABRI) is seeking experienced service providers to contribute to a knowledge-sharing project aimed at documenting and showcasing successful digital Public Financial Management (PFM) reforms across African countries. This initiative seeks to capture practical experiences, lessons learned, and best practices in implementing digital solutions that enhance transparency, efficiency, and accountability in public financial management.



The selected service provider will be responsible for developing detailed PFM stories by interviewing representatives from participating countries. These stories will illustrate how various nations are leveraging digital technologies to reform their PFM systems, address common challenges such as system fragmentation and weak interoperability, and achieve impactful results that strengthen financial management and governance.

This project aims to foster peer learning among African countries, inform policy discussions, and support the scaling of innovative digital PFM solutions across the continent. We invite qualified service providers with expertise in PFM, digital transformation, or related fields to submit their expressions of interest. If you have a strong background in public financial management, digital reforms, and storytelling, we encourage you to apply.

ESTABLISHMENT OF THE SHORTLIST

A shortlist of bidders will be established at the end of this process. The submissions will be judged on the following criteria.

Criteria	Description	Weight
Relevant Experience & Qualifications	Demonstrated experience (minimum 5 years) in public finance, governance, or digital PFM reforms; expertise in research, storytelling, and stakeholder engagement.	25%
Technical Proposal	Quality, clarity, and feasibility of the proposed approach and methodology for delivering on the research, video storytelling, and workshop facilitation tasks. Includes understanding of the ToR and proposed workplan.	25%
Research & Storytelling Skills	Demonstrated ability to conduct qualitative research (interviews, desk review) and develop compelling narratives from technical data. Includes writing and editing capacity in English and French (Portuguese is a plus).	20%
Samples of Similar Work	Samples of previous work related to digital PFM, storytelling, policy documentation, or similar video/documentary projects and reference letters	15%
Financial Proposal	Cost-effectiveness and clarity of financial proposal, including daily rate, number of days, and value for money.	15%



Interested candidates must submit their applications via e-mail: procurementwm@cabri-sbo.org.

Deadline for submissions is **25th June 2025**. No late submissions will be accepted. Enquiries can be sent via e-mail: procurementwm@cabri-sbo.org

1. BACKGROUND

In Africa, Public Financial Management (PFM) is evolving through the adoption and integration of innovative digital systems. Governments are increasingly leveraging technology to enhance fiscal transparency, boost efficiency, and ensure accountability across various sectors. From budgeting to financial reporting, from procurement to revenue collection, digital tools are facilitating swift and informed decision-making. However, the journey towards fully digitized PFM is fraught with challenges. Many nations face significant hurdles, including the integration of new digital systems with legacy platforms, building necessary technical capacities, and ensuring widespread user adoption amidst varying degrees of digital literacy.

Recognizing these dynamics, CABRI, in collaboration with ODI Global, hosted a digital PFM conference in November 2024 to explore how digital tools can transform financial management and improve public service delivery. The conference provided a platform for dialogue among finance, digital, and development leaders, showcasing experiences and lessons learned from various countries engaged in implementing digital PFM solutions. The discussions revealed a range of successes, challenges, and impact critical insights that could inform future efforts across the continent.

In this context, the development of compelling digital PFM reform stories is essential. These narratives will not only document the technical and human complexities involved in the reforms but will also bring to light the lived experiences of those driving these changes. By capturing both the data and the human side of digital PFM reforms, we can foster a deeper understanding of what works and what doesn't.

Objective

The objectives of this assignment are to:

- i. To document successes and challenges of digital PFM reforms, focusing on technical and human aspects of system integration in the form of videos
- ii. To support the design and facilitation of a workshop that draws on PFM stories to guide conversations and dialogue, allowing stakeholders involved in digital Public Financial Management (PFM) reforms to share their practical experiences, challenges, and strategies. The workshop will serve as a platform for peer learning, using real-world PFM narratives to highlight lessons learned and inform future reform initiatives.

2. SCOPE OF WORK

The service provider will undertake the following tasks:

- **Conduct Research and provide inputs to the interview questions:** Conduct background desk research, provide inputs to the Interview questions and interview 6 stakeholders to gather insights on digital PFM reform initiatives across participating countries.
- **Develop Narratives:** Support the development of two engaging and well-structured digital PFM reform stories (videos) based on the research findings and interviews conducted with stakeholders from participating countries.



- **Workshop support and facilitation:** support the development and delivery of a workshop to present findings, share stories, and engage stakeholders in dialogue.
- To highlight key lessons learned from the implementation of digital Public Financial Management (PFM) reform, as shared by stakeholders during the workshop discussions through the PFM stories presented. These insights will inform future reform efforts and policy development.

Collaborate with Team: Work closely with the project team to refine and finalize the stories for publication and dissemination.

PERIOD OF ASSIGNMENT

A total of 40 working days are envisaged for this consultancy with key milestones and deadlines agreed upon with the project team.

Task	Expected Number of days	Deliverable
Conduct Research and provide input to the research questions: Conduct background desk research, provide inputs to the research questions and interview at least 8 stakeholders to gather insights on digital PFM reform initiatives across participating countries.	10 days	Identify countries which will share a PFM reform stories
Develop Narratives: Support the development of two engaging and well-structured digital PFM reform stories (videos) based on the research findings and interviews conducted with stakeholders from participating countries.	15 days	Two well-documented digital PFM reform stories and accompanying videos.
Support the development and delivery of a workshop to present findings, share stories, and engage stakeholders in dialogue & Final report writing	15days	A workshop and a final report

3. REQUIRED QUALIFICATION AND EXPERIENCE

The ideal service provider should possess:

- At least 5 years' experience in public finance, governance, or related fields, with a focus on digital PFM reforms.
- Strong research, analytical, and storytelling skills.
- Fluency in English and French. Portuguese is an advantage.
- Knowledge of digital PFM reforms, policy frameworks, and implementation challenges.



- Excellent writing, editing, and analytical skills.

4. WORKING MODE OF THE EXPERT

The service provider will be required to work both physically and virtually. Interviews can be conducted remotely, while recording digital PFM (Public Financial Management) stories and facilitating the workshop will require physical presence. Therefore, the service provider should be flexible and adaptable to both working modes.

Mode of Communication and Working Arrangements:

- **Frequency of Meetings:** Bi-weekly meetings on Microsoft Teams to discuss progress, provide updates, and clarify any doubts.
- **Duration of Meetings:** 1-hour meetings via Microsoft Teams.
- **Location:** Meetings will be held virtually; however, the service provider may be required to travel to Centurion, Gauteng, South Africa for workshops and in-person meetings, depending on project requirements.
- **Communication Channels:** Regular email updates, phone calls, Microsoft Teams for meetings, and instant messaging for real-time communication.

5. SCORING SHEET

TECHNICAL & FINANCIAL

#	Criteria	Description	Weight	Score (1–5)
1	Relevant Experience, Qualifications & Academic Background	Demonstrated experience (minimum 5 years) in public finance, governance, or digital PFM reforms; expertise in research, storytelling, and stakeholder engagement. Includes academic qualifications: Master's degree in economics, Public Policy, or Public Financial Management (PFM) or related field.	25%	1: 0 years of experience; no relevant master's degree 2: 1-2 years of experience; general master's degree 3: 2-3 years of experience + Master's in relevant field 4: 3-4 years of experience + Master's in relevant field 5 : 5 + years of experience + master's in economics, Public Policy, or PFM + strong stakeholder leadership
2	Technical Proposal	Quality, clarity, and feasibility of the proposed approach and methodology for research, video storytelling, and	25%	1 : Vague/generic approach; poor ToR alignment 2: Basic methodology; unclear workplan



		workshop facilitation. Includes understanding of the ToR and proposed workplan.		3: Clear methodology and feasible workplan 4: Tailored, thoughtful approach with good structure 5 : Comprehensive, innovative, well-articulated methodology
3	Research & Storytelling Skills	The ability to conduct qualitative research (interviews, desk review) and craft compelling narratives from technical data. Writing/editing in English and French (Portuguese is a plus).	20%	1: Weak research and storytelling skills; English only 2: Basic research; English only 3: Strong research and storytelling; basic French 4 : Proficient in English and French 5 : Excellent skills in storytelling and proficiency in English and French; Portuguese a plus
4	Samples of Similar Work	Previous work in digital PFM, storytelling, policy documentation, or similar video/documentary projects; reference letters included.	15%	1: No or irrelevant samples; no references 2: One limited or loosely relevant sample 3: Two moderately relevant samples with 1 reference 4: Three strong, relevant samples; 2 references 5: Three+ high-quality samples and strong references
5	Financial Proposal	Cost-effectiveness and clarity of proposal, including daily rate, number of days, and value for money.	15%	1: Unclear or excessive costing; low value 2: High cost; minimal justification 3: Fair pricing; average value 4: Competitive cost; clear and well-justified 5:Excellent value; fully transparent and reasonable
	Total		100%	

6. PROCUREMENT PREREQUISITE DOCUMENTATION

- Interested service providers are invited to submit their application, including:
- A cover letter detailing their relevant experience.



- A technical proposal presenting the proposed approach and technical issues to be uncovered through the project
- A portfolio or samples of similar work.
- A financial proposal outlining consultancy fees, inclusive of all taxes.

7. REQUESTS FOR BIDS

Requests for project proposals/bids procured through this panel will be done through a “Public Bidding” process.

SUBMISSION AND INQUIRIES DETAILS

Interested candidates must submit their applications through e-mail:

The application deadline is **25th June 2025**. No late submissions will be accepted.

Enquiries: The point of contact for enquiries only is Winnie Kemunto Mageto Email: procurementwm@cabri-sbo.org, Phone +254724453560