Call for expressions of interest

Consultancy services for i2i midterm review   May 2018

1. Introduction

About the i2i facility. insights2impact (i2i) is a resource centre that aims to catalyse the provision and use of data by private and public-sector actors to improve financial inclusion through evidence-based, data-driven policies and client-centric product design. i2i aims to accomplish this by building on and showcasing the existing knowledge base of financial inclusion data and collaborating with a wide range of partners.

The i2i programme is implemented by Cenfri, based in Cape Town, and FinMark Trust (FMT), based in Midrand, Johannesburg. The i2i staff is therefore split across these two locations. I2i is funded by the Bill and Melinda Gates Foundation, based in Seattle, USA, in partnership with the MasterCard Foundation, based in Toronto, Canada. To date, i2i has partnered with financial sector deepening trusts (FSDs) and other project partners across a number of African, Asian and Latin American countries.

2. Context and objectives

The **vision** of i2i is that policymakers, financial service providers, and financial inclusion development partners, use data to make effective, evidence-based decisions that drive positive financial inclusion and positive welfare outcomes. Data-driven policies and client-centric product design lead to financial services that respond to the needs of people who are traditionally underserved by the formal financial systems.

Our **mission** is to unlock development outcomes by mobilising the data market and catalysing the generation and use of high quality, client-centric data. We accomplish this by advancing measurement frameworks, client research, and the innovative use and collection of data with the purpose of improving the effectiveness of financial inclusion policies, products, and programmes. We aim to be the leading global resource centre for financial inclusion data.

Rationale for mid-term review. The purpose of the mid-term review is to learn from the i2i implementation experience and provide an objective review of the project objectives achieved and an assessment of its performance to date[1]. A strong emphasis will be placed on learnings derived, against a set of learning questions, as well as determining what the *contribution* made by the programme is, as opposed to attributing impact solely to the programme's interventions. The intention is to inform improvement of implementation in order to maximise the potential to achieve the intended results at the end of the 5-year programme period and to assess the emerging opportunity areas for enhancing achievements. This will improve i2i's work as well as provide our funders with valuable learnings that can be applied more broadly, beyond the context of i2i. A particular emphasis must be placed on the sustainability of both the i2i portal, and the i2i programme overall.

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[1] The programme was implemented in two stages. The first started in December 2014, while the second started in June 2015.

3. Scope of the evaluation

Focus areas. The review will focus on the following areas:

- **Strategic relevance and operating model:** How adaptive has i2i been to market needs and changes? Particular attention should be given to the way that the programme assessed and adapted their strategic relevance to date.
- **Management and organisation:** How has i2i's internal team and governance structure evolved to reflect the new priorities of the market? This includes an assessment of the operating model and the capacity of the organisation (e.g. competency, management, systems and processes) and how it was adapted or responded to the lessons learned to date. It also includes a review of the programme and implementation partners' engagement with the programme donors to date.
- **Programme effectiveness**: What are the main programmatic achievements and challenges to date? How sustainable are the accomplishments? What value has been added for targeted stakeholders, and what is the perception of i2i among these stakeholders? In addition, to what extent have these stakeholders (governments, partners, and grantees) taken advantage of the insights generated by i2i?
- **Lessons learned:** The lessons learned from the first three years of implementation which can be applied both to inform and improve the operations of i2i for the final two years of the programme, and to provide the funders with learnings that can be applied more broadly in their intervention strategies.
- **Sustainability:** What potential business models could i2i feasibly pursue to ensure the ongoing provision of its services beyond initial donor commitments?

Information requirements. The evaluation should consider the following data sources:

- Existing programme and project data, including internal monitoring and evaluation data
- Existing online external data sources
- Interviews with i2i leadership team and i2i staff
- Interviews with members of the management committee for i2i, including Cenfri and FMT management committee members
- Key informant interviews with grantees and project partners such as FSDs.
- Key informant interviews with industry leaders, programme alumni, and implementation partner staff that were instrumental in developing i2i
- Targeted primary data collection on case studies

4. Experience required

Individuals or firms that apply should ideally have experience in the following areas:

- Reviewing and evaluating the impact/effectiveness of research.
- Reviewing and evaluating interventions which focus on systems-level changes.
- Evaluating programmes focusing on the data market and/or financial sector.
- Financial sector development and financial inclusion. Familiarity with the network of financial sector deepening trusts in Africa will be a benefit.

5.   Information required for EOI submissions

Expressions of interest (EOIs) are invited from individual consultants, as well as consulting firms. EOIs to undertake this project must be 5 pages or less (excluding CVs and firm profiles), and must include:

1. A description of your understanding of the objectives and requirements for the review.
2. A description of your proposed approach to the work.
3. Statement of qualifications of firm(s) and/or individuals.
4. Name and CVs (maximum three pages each) of staff members responsible (i) for overseeing the work; (ii) for undertaking the work.
5. Daily rates (in South African Rand), of individuals that will be involved in the review.
6. Contact information (email, Skype)
7. Location of individual(s) or firm that will be conducting the work.

The contact person at i2i is Emily Westerlund who can be contacted at +27 21 913 9510 or by email at emily@i2ifacility.org. Please CC Karen Kuhlcke at karen@i2ifacility.org in all communications. Please email your EOIs to Emily and Karen by **17h00 (CAT)** on **Friday, 18 May 2018**.

A short list of service providers will be announced within two weeks of the EOI closure date. Shortlisted service providers will be provided with a detailed Terms of Reference, and invited to submit a detailed technical and financial proposal by 20 June 2018. The work is expected to be completed over a two-month period ideally starting in late June.

Questions or comments in respect to this EOI should be directed to Emily at emily@i2ifacility.org, copying in Karen at karen@i2ifacility.org, no later than Friday, 11 May 2018. In line with the i2i's policy of transparency, answers to queries from one individual or firm will be circulated to all who indicated their intention to submit an EOI.