

Terms of reference

Evaluator for mid-term review of 4.5-year EuropeAid Grant Agreement

Forus (previously known as International Forum of National NGO Platforms or IFP) is seeking an external evaluator to support the monitoring and evaluation of the project “*A stronger International Forum of National NGO Platforms for greater impact on public policies*”.

Background

Project description

The final aim of the project “*A stronger International Forum of National NGO Platforms for greater impact on public policies*” is for development NGOs to influence public policies directly at the national, regional and global levels, as full development actors in their own right, contributing directly to ensure Human Rights, facilitate poverty eradication and address its causes, and achieve sustainable, equitable and inclusive development. Forus (IFP) and its members will pursue this aim by being a legitimate and representative catalyst of development NGOs’ voice across the globe.

The project has three interlinked specific objectives:

- 1) To strengthen Forus institutional, organizational and operational capacities;
- 2) To strengthen the capacity to achieve their objectives, exchange and learning of national and regional platforms and Forus;
- 3) To increase the impact and realize the full potential of Forus to advocate at national, regional and global levels.

The detailed presentation of the project and its log frame are available upon request.

Time frame and grant agreement

The project is supported by the European Commission (EuropeAid) and is co-funded by the French Development Agency (AFD). It is being implemented at the global level with more than 50 co-applicants (Forus national and/or regional members) since September 2016. The project duration is 54 months (4.5 years); the project end date being March 2021.

Forus is developing these activities in the more global context of a Framework Partnership Agreement (FPA) with the European Commission valid until end 2020.

Activities:

- 1) Strengthening of institutional, organizational and operational capacities: creation of a legal structure, staff recruitment, updated communication strategy, fundraising, regular meetings of the governing and consulting bodies, outreach & enlargement processes...
- 2) Capacity development, exchange and learning of national and regional platforms and Forus: members’ needs assessment, peer-exchange and learning activities, subgranting scheme & support to national and regional capacity development projects, dissemination and creation of toolkits, leadership development program...

- 3) Advocacy at national, regional and global levels: thematic advocacy working groups (e.g. 2030 agenda), policy/position papers, participation in/contribution to international events, subgranting scheme & support to national and regional advocacy projects, peer learning and experience sharing on the advocacy activities among members, collaboration with other civil society networks...

Previous evaluations

In the framework of the Results Oriented Monitoring (ROM) exercise implemented by the European Commission, this project has already been evaluated by an external consortium contracted by the European Commission. This ROM evaluation was conducted from End October 2018 to Beg December 2018 and focused on global and regional activities implemented directly by Forus or by its regional members in Africa, Asia, Pacific and Latin America. When Forus receives the ROM evaluation report we will make it available to the external evaluator.

The lessons learnt from the ROM exercise shall orient the mid-term review, and specifically the evaluation questions and the evaluation matrix.

Purpose and scope

The overall purpose of the mid-term evaluation is to:

- gather evidence of change by evaluating both qualitative and quantitative data against the project's indicators; capture achievements of the programme's results and indicators;
- advise and support the project management in adjusting the processes for the implementation of the remaining project period, and for improving the monitoring framework to measure the progress in the project, going beyond the recommendations of the ROM review conducted in 2018;
- draw lessons and concrete recommendations for enhancing the quality of Forus activities as well as ensuring accountability to various stakeholders involved;
- contribute to the project's learning culture and support the project on harvesting change and showcasing the lessons learnt, thus informing Forus future strategy.

The scope of the mid-term review is the 1st stage of implementation of the 54-month EC-funded project *"A stronger International Forum of National NGO Platforms for greater impact on public policies"*.

The audience of the review will be:

- Forus secretariat team and governance: for mapping out reflections and lessons learned from the mid-term project activities and to use the recommendations for implementing the project activities during the remaining project phase.
- Donors (European Commission/EuropeAid and French Development Agency): for assessing the effective and efficient use of the funding to achieve stated goals and results of the project.
- Members and partner organizations that may be interested in the results and lessons learned from this evaluation.

Approach and methods

Evaluation work shall be carried out on the basis of the OECD DAC Criteria for Evaluating Development Assistance and shall also comply with the recommendations of project donors (Evaluation methods of the EU' external assistance and Evaluation principles of the French Development Agency).

The review shall mainly be conducted remotely through interviews and desk study. Meetings with the secretariat staff at Forus headquarters in Paris can be envisaged. The list of interviewees is to be defined with Forus during the inception phase.

Principles underpinning the evaluator's approach are:

- Participatory and culturally sensitive process valuing knowledge and approaches from within the context;
- Impartiality and independence of the evaluation process from the programming and implementation functions;
- Credibility of the evaluation, through use of appropriately skilled and independent expert;
- Transparency of the evaluation process, including wide dissemination of results;
- Usefulness of the evaluation findings and recommendations, through timely presentation of relevant, productively critical, clear and concise information, and commitment to building capacity. The evaluator may refer to the Critical Friend methodology.

The evaluator will develop the methodology and tools of the evaluation in consultation with Forus management and staff. The evaluation methodology and data collection tools will need approval from Forus management.

The mid-term review consists of several phases:

- Contract and Kick-off meeting: Contract is signed, and a discussion of the assignment takes place. First documents are provided to the evaluator.
- Inception phase: Submission of inception report (which describes a proposal for the design of the evaluation and elaborates on how data will be obtained and analysed). The use of a data collection planning worksheet or a similar tool is required. Data triangulation and quality control are very important and need to be discussed in the inception report. Evaluation questions and evaluation matrix shall be discussed and validated at that stage.
- Desk review and interviews: The evaluator studies all necessary project documents; re-constructs and analyses the intervention logic and its assumptions. Existing data needs to be analysed and interpreted. It is expected that data and information will be obtained through different methods such as: analysis of documents, structured interviews, semi-structured interviews face-to face (with a limited number of persons) or by phone, group discussions, online-survey (if applicable), others. (no field trips to visit the partners and members are foreseen)
- Final draft report: Submission and presentation of final draft report to management and governance bodies. Inclusion of comments from partners and Forus. Support the staff in the process of setting new indicators and improving existing ones, if needed.
- Final report: Submission of final report (see reporting requirements in annex).

Evaluation criteria and specific evaluation questions

Possible evaluation criteria: relevance, impact, effectiveness, efficiency and sustainability.

The evaluator has to analyse the following points but only if the information is not yet available from the previous ROM review:

- the design and coherence of the project including the design of the logframe matrix, the underlying theory of change and its assumptions;
- the extent to which the project has already achieved its objectives and results or is likely to achieve them;
- the strengths and weaknesses in terms of planning, management, implementation and monitoring
- the extent to which cross-cutting issues were applied.

The evaluator shall consider the following specific questions. They should be responded as Key findings of the evaluation (see Indicative report format in annex).

Relevance

- To what extent was the project's approach relevant?
- Which activities of the project showed greater relevance?
- Are the activities and outputs of the programme consistent with the intended impacts and effects?

Effectiveness

- To what extent has the project already achieved its outcomes/expected results/outputs or will be likely to achieve them?
- To what extent have all project stakeholders collaborated as planned?

Efficiency

- Was the project implemented in the most efficient way (time, personnel resources)?
- If appropriate, how flexible is the project in adapting to changing needs?
- How does the project coordinate with other similar interventions to encourage synergy and avoid overlaps? What can be done to improve this, if needed?
- Were activities cost-efficient? Have the activities and outputs been delivered with good value for money?

Impact

- What, if any, impacts are already apparent? What impacts appear likely? Have there been/ will there be any unplanned positive impacts?
- To what extent do capacity development activities implemented by Forus impact national members?

Sustainability

- What needs to be done and/or improved to ensure sustainability? What is the level of ownership of the project by target groups?
- Is there a financial/ economic phase-out strategy? If so, how likely is it to be implemented?

Cross-cutting issues

- To what extent is transparency, accountability and good governance ensured in the organisation?
- To what extent was gender mainstreaming included in the project? If so, how and to what effect?
- To what extent was environmental mainstreaming included in the project? If so, how and to what effect?
- To what extent were the social standards monitored by relevant partners? Have any issues emerged, if so which ones and why?
- Does the project actively contribute to the promotion of Human Rights? If so, how? If not, why not?
- To what extent do Forus national members monitor the implementation of SDG at the national level? What is the level of ownership amongst member on the issue of SDG monitoring?

Timeframe

A total of **20-30 working days** is currently estimated for this assignment.

Activity	Indicative dates
Submission of bid (electronically)	Feb 2019
Contract signed and documents provided	March 2019
Kick-Off meeting	March 2019
Submission of inception report with methodology proposal	March/April 2019
Approval of inception report	April 2019
Desk Study and interviews	April/May 2019
Submission of final draft report	May/June 2019
Presentation of final draft report	May/June 2019
Inclusion of feedback in final draft report	June/July 2019
Submission of final evaluation report	June/July 2019

Evaluator qualifications

Applicants may be individuals or consultants. They will report to and work under the guidance of Forus secretariat.

Key qualifications should be:

- Relevant academic degree (master level).
- A minimum of ten years' experience and expertise in the non-profit sector, preferably networks in the field of development and linked to networks.
- At least three evaluations in the last five years, ideally in the relevant field to a high standard.
- Demonstrated experience of evaluation involving qualitative data and 'soft' outcomes.
- Demonstrated experience of evaluating multi-country projects that are funded by the European Commission.
- Working experience in several countries and continents.
- An understanding of the nature of capacity development work and advocacy activities.
- Experience in project cycle management.
- Excellent oral and written English skills.
- Capacity to study documentation and conduct interviews in French and/or Spanish.

Deliverables

The evaluator is expected to submit the following reports:

- an inception report (5 pages without annexes),
- a final draft evaluation report (it should not exceed 30 pages excluding annexes), including:
 - o draft executive summary of key findings and recommendations;
 - o evaluation findings, analysis and conclusions with associated evidence and data clearly illustrated. Use of tables, graphs, quotes, anecdotes and stories to illustrate findings and conclusions is encouraged;
 - o recommendations for the next actions, which should be practical and linked directly to conclusions;
 - o appendices, including methodology and evaluation tools, list of interviewees, questionnaire, and brief biography of evaluator.
- and the final evaluation report (same requirements as the draft evaluation report) in 2 versions, one external focused for the project donors, another one internal focused on recommendations for Forus future strategy.

All reports shall be written in English and submitted electronically in a MS-Word document.

The executive summary shall summarize key findings and recommendations and be submitted as part of the final draft report. The findings and recommendations of the final report have to be structured according to the indicative report format proposed by Forus (see in Annex), including the specific evaluations questions described above, to be presented as Key findings in the final report.

An outline of the report's structure needs to be agreed upon during the inception phase, suggestions from the evaluator will be welcomed.

The quality of the reports will be judged according to the following criteria:

- Is the results-matrix format part of the report?
- Does the report contain a comprehensive and clear executive summary?
- Were the Terms of Reference fulfilled and is this reflected in the report?
- Are all evaluation questions answered?
- Are the methods and processes of the evaluation sufficiently documented in the evaluation report?
- Are cross-cutting issues analyzed in the report?
- Are the conclusions and recommendations based on findings and are they clearly stated in the report?
- Does the report clearly differentiate between conclusions, lessons learnt and recommendations?
- Are the recommendations realistic and is it clearly expressed to whom the recommendations are addressed to?
- Were the most significant stakeholders involved consulted?
- Does the report present the information contained in a presentable and clearly arranged form?
- Is the report free from spelling mistakes and unclear linguistic formulations?
- Can the report be distributed in the delivered form?

The report will be credited to the evaluator and potentially placed in the public domain at the decision of Forus.

Coordination/Responsibility

Forus will provide preparatory and logistical assistance to the evaluator, including:

- Background materials (project proposal, periodic reports, existing evaluations, etc.).
- Meetings, phone/e-mail communication with program administrators, partners and stakeholders.
- Identify interviewees and provide contact information.
- All logistical support for any field visit, including the travel cost (local as well as air travel).
- Arranging meetings and appointments with stakeholders and beneficiaries.

Final payment is dependent on the submission and approval of the final report.

Application

Interested candidates shall submit:

- **A technical offer** including:
 - Evaluation methodology: Describe your overall approach and evaluation methodology including, but not limited to, evaluation questions, evaluation design, proposed tools and methodology.
 - Understanding of the issues at stake and the Terms of Reference.
 - Relevant experience: Provide details of projects of similar scope, complexity and nature you have worked on previously. Please include any experience with EU-funded project data collection and analysis.
 - Specific expertise: international networks.
 - Key personnel and staffing: Describe the key personnel. Include CVs (no more than 2 pages each and attached as annex) of key personnel who will be part of the proposed plan.
 - Timeline: Include a detailed timeline of key activities.
 - Three references (including telephone numbers) and web links to previous work (if available).

- A detailed **financial offer** including:
 - a line-item budget: The cost estimates used to prepare the budget should be presented in Euro. The tenderer should include his/her proposed daily rate, including all costs.
 - a budget narrative.

When analysing the application Forus will apply the following weight criteria:

- technical offer: 60%
- financial offer: 40%

Reasonable and receipted travel and accommodation costs related to the execution of the tasks in these Terms of Reference will be covered, based on prior agreement and subject to certain conditions. Value for money will be considered in the evaluation of the offer.

The applicants must send off requested documents electronically with the reference “Consultant - mid-term review” to: recruitment@forus-international.org ,

The deadline to apply is **28 February 2019**.

Only complete applications will be considered.

Annex - Indicative report format

Table of Contents : Main headings and page numbers, acronyms

Executive Summary (2 pages) :

- Overview of the project
- Description of the purpose of the evaluation and the evaluation objectives
- Main audiences and users of the review findings
- A short description of evaluation methods
- Short summary of key findings, conclusions and recommendations

Introduction (1 page):

Explanation of the context in which this evaluation was conducted.

- Purpose of the evaluation
- Audience and users of the evaluation

Project Overview: (2-3 pages) :

This section of the report is to provide enough information to the user or reader about the project in order for them to understand the evaluation results. It must include :

- Project goal and objectives,
- Phases, significant challenges or alterations to the project (plans, strategies, logical frameworks),
- Key partners,
- Total resources,
- Context (socio-economic, political, institutional),
- Implementation constraints.

Evaluation Methodology (1-2 pages):

- Geographical areas,
- Data gathering time period,
- Type of data collected,
- Evaluation team and corresponding responsibilities,
- Ethical considerations,
- Limitations and constraints, potential bias and mitigations measures,
- International standards used as reference for the evaluation,
- Intervention logic description along strategy.

Key Findings (10 pages max):

In this section the evaluation questions must be answered using evidence and data. This section should be structured in a way that the reader can easily make connections between the purpose of the evaluation and the data gathered.

Assumptions or risks in the project, and any variances between planned and actual results should also be stated

The evaluation matrix should be presented with the evaluation questions, criteria, assumptions and indicators.

Conclusions (1 page):

- Summarize any overarching lessons learned,
- Highlight strengths and weaknesses,
- Conclusions should be based on evidence and address evaluation questions.

Recommendations: (1 page)

- Practical, feasible recommendations for the intended users. Recommendations should be supported by evidence gathered and linked to conclusions related to key evaluation objectives. Recommendations should be action-oriented.
- Proposed additional monitoring activities jointly developed with Forus staff and including a budget.

Appendix/Annexes

- Short biography of evaluator
- Copy of methodology (Survey questions, checklists)
- List of individuals interviewed (anonymized), supporting documents reviewed, summary tables displaying progress on key indicators, outputs, outcomes
- Powerpoint presentation of the main findings and recommendations