

SPECIFIC TERMS OF REFERENCE – PART A

EUROsociAL+ Mid-Term Evaluation

FWC SIEA 2018 - Lot 4: Human development and safety net

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SIEA-2018-1737

Contracting Authority: **European Commission** – DG International Cooperation and Development – DEVCO G2, Latin America and Caribbean operations

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1 BACKGROUND

1.1 Relevant region and sector background

EUROsociAL+ is the EU programme aiming at consolidating cooperation and policy dialogue related to social cohesion between Latin America and the European Union (EU). EUROsociAL+ contributes to the design, reform and implementation of public policies in Latin America, which have an impact on social cohesion and reduction of inequalities.

Social cohesion was affirmed as **one of the priorities of the European Union - Latin America and Caribbean (EU-LAC) strategic relationship** at successive summits¹ of Heads of State and Government. Since 2005 the EU has been supporting social cohesion in Latin America with 3 editions of the EUROsociAL programme. Throughout the years, the programme has evolved and adapted to keep responding to the needs of the region.

Highlights of the 2 first phases of the programme:

EUROsociAL I (2005-2010)

A first phase of EUROsociAL achieved significant progress concerning the implementation of sectorial policies geared towards enhancing social cohesion. Programme activities focused on five thematic areas: **Education, Employment, Taxation, Justice and Health**. The European Commission contributed €31 million to the programme.

During this first phase of EUROsociAL, 2,354 public institutions (1,570 from Latin America, 593 from the European Union Member States and 191 from international bodies) implemented 475 different activities. **Thanks to the programme's support, the concept of social cohesion became a frame of reference for the development of public policies** in a region plagued by high levels of inequality.

EUROsociAL I played a part in shaping new public policies, introducing innovations into existing policies and strengthening the institutional capacity of the public administrations dealing with those policies. EUROsociAL I also supported the creation of new international agreements important for social cohesion.

EUROsociAL II (2011-2015)

The objective of the second phase of EUROsociAL was to support public policies aiming at improving social cohesion and to strengthen the institutions carrying out those policies. The EU financed the programme's total cost of €40.35 million.

The programme was launched in 2011 and its activities finalised at the end of 2015. EUROsociAL II had proven to be a **relevant cooperation model**, both for low and middle income countries, showing to be a highly valued instrument of cooperation, based on the pillars of knowledge exchange -and not transfer of knowledge funds-, on dialogue, flexibility and orientation to demand. EUROsociAL II contributed to a high number of results in different thematic areas and countries, mainly in **institutional strengthening** at different levels, supporting additionally the **articulation of regional integration in key inclusive public policies**.

¹ 2004, Guadalajara, Mexico https://www.europarl.europa.eu/cmsdata/124266/iii_2_5_2004_guadalajara_en.pdf

2006, Vienna, Austria: [Final Declaration of the Vienna Summit in 2006](#)

2008, Lima, Peru [Final Declaration of the Lima Summit in 2008](#)

2010, Madrid, Spain [the EU-LAC Summit: Madrid Declaration in 2010](#)

EUROsociAL+ (2016-2021)

This third phase of the programme is the subject to this evaluation. Detailed information is provided in the following chapters.

1.2 The Intervention to be evaluated

EUROsociAL+² in its third phase of implementation seeks to contribute to improving social cohesion in Latin American countries, by **supporting national public policies** attempting to increase the level of social cohesion as well as to institutional strengthening through support to their processes for design, reform and implementation of public policies.

The Programme applies a **demand-driven approach**; it is **result oriented** and looks for **intersectoriality³**. The key features of the methodological strategy used by the Programme are: a **multidimensional approach** to tackle inequalities; and the promotion of **peer-to-peer learning** and experience exchanges between institutions of both regions (EU-LA). This includes triangular cooperation schemes by capitalizing on existing experiences within the Latin-American region that have potential to boost public policies in other LA countries

The programme is structured around three public policy areas: **Gender Equality, Democratic Governance and Social Policies**. The support offered by the programme is based on the processes of creation, qualification and innovation in public policy, with a differentiated approach for each country and in line with the 2030 agenda and the perspective development in transition.

The programme has a regional coverage and actions can be implemented at different levels: sub-national, national, multi-country and regional level.

With a total UE contribution of **€32 million** the programme was launched in 2016 and will finalise its activities by the end of 2021.⁴

Title of the Intervention to be evaluated	<ul style="list-style-type: none">• EUROsociAL+
Budget of the Intervention to be evaluated	<ul style="list-style-type: none">• €32 million
CRIS and / or OPSYS number of the Intervention to be evaluated	<ul style="list-style-type: none">• LA 2016/378-496
Type of contract	Grant contract in Delegated Cooperation ⁵
Dates of the Intervention to be evaluated	<ul style="list-style-type: none">• Start: 31/10/2016• End: 31/10/2021⁶

² <https://eurosocial.eu/>

³ Initiatives across different policy sector areas

⁴ It is expected that the project duration will be extended. Addendum request to be submitted in the coming weeks.

⁵ “*Convenio de Subvención para organizaciones que han sido objeto de una evaluación por pilares*”

⁶ See previous footnote

1.2.1 Objectives

Overall objective

The **Global Objective** of the programme is "To contribute to increasing the level of social cohesion in Latin America", understood as: "An attribute of societies that implies equal opportunities so that the population can exercise its fundamental rights and ensure its well-being, without discrimination of any kind and taking into account diversity. From an individual perspective, social cohesion implies the existence of people who feel part of a community, actively participate in various decision-making spheres and are capable of exercising active citizenship. Social cohesion also implies the development of public policies and solidarity mechanisms between individuals, groups, territories and generations". According to this definition, the understanding of social cohesion in EUROsociAL+ has to do with the reduction of inequalities and well-being based on equal opportunities, a sense of belonging and solidarity.

Specific objective

The **specific objective** is to support social, good governance and gender equality national public policies attempting to increase the level of social cohesion and to strengthen the institutions responsible for their implementation in their capacity to provide high quality public services.

The Programme has been designed without a Logical Framework (LF) because of its **demand-driven nature** that allowed it to develop a set of diversified interventions, per country, multi-country or regional level. Although the logic of intervention of the programme -as above summarised- is defined in its design documents, this has never been translated into a Logical Framework Matrix.

It is worth mentioning with this respect, that in order keep the overall intervention logic under constant control the programme has developed an integrated monitoring tool, **SOFIE**, which includes all the information related to the actions, methodology of intervention, products (outputs) and results (outcomes).

During the second half of its implementation period, the team of EUROsociAL+ has worked on elaboration of a results oriented management framework ("**Marco de Gestión por Resultados**")⁷. It is based on the data of the programme available in SOFIE and it is linked with the EU Results Framework, the EU Gender Action Plan 2⁸ and the Sustainable Development Goals / Agenda 2030. Its first applications of the Results Framework (so far in Uruguay and in Costa Rica) show an improvement in the programme's capacity to demonstrate the results achieved, with implications in terms of EU visibility.

1.2.2 Implementation so far

In the current phase of the programme, EUROsociAL+ has implemented more than **300 actions to support public policies** on three areas:

- Social policies:

- Policies of social inclusion and fight against poverty;
- Active employment policies;
- Policies for youth, adolescence and childhood;
- Care policies.

⁷ Marco de Resultados EUROsociAL: https://eurosocietal.eu/fichas_descargables/marco-de-resultados-eurosocietal/

⁸ Guía metodológica Marco de Resultados **Género**: <https://eurosocietal.eu/biblioteca/doc/marco-de-resultados-programa-eurosocietal/>

- Democratic governance policies:
 - Public finances;
 - Territory development;
 - Access to justice, prevention of violence and reintegration of persons deprived of their liberty;
 - Good governance and construction of citizenship;
- Gender equality policy:
 - Physical autonomy;
 - Political autonomy and parity;
 - Economic autonomy and care;
 - Violence, sexual and reproductive health
 - Mainstreaming of the gender perspective, development of gender studies and gender-sensitive budgets.

To tackle inequalities in their multidimensional nature, the programme has set up since 2018 national high-level consultation platforms: the so called “**Mesas de dialogo país**”. This methodology aims at targeting support towards strategic policies, promoting a whole-of-government approach and enshrined in national development plans. These platforms of dialogue allow for exchanges between institutions and administrations, generating intersectorality, complementarity alignment with the 2030 Agenda and offer support to establish national country strategies. They are currently being implemented in 14 countries of Latin America.

Gender was introduced as a specific component in this phase of the programme. Moreover, and following the recommendations of a Results Oriented Monitoring (ROM) report (2019), EUROsociAL+ created a new position for a gender expert to insure gender mainstreaming in all the actions of the programme.

The current **COVID-19** crisis has enhanced social inequalities. Consequently, the programme has redirected interventions to the new context and new demands of LA countries, supporting the management and recovery of the pandemic.

1.2.3 Implementing agencies and Programme organization

Three Member States’ agencies implement the programme: FIIAPP (Spain)⁹, IILA (Italy)¹⁰ and Expertise France (France)¹¹, while other UE Member States may provide expertise as the programme applies a demand-driven approach. A Latin American institution takes part in the consortium as associated: SISCA (Secretariat of Central American Social Integration)¹².

The programme coordination is managed by FIIAPP, leader of the consortium. Each member of the consortium is in charge of a specific thematic area: Social Policies is managed by IILA, Gender Equality by Expertise France and Governance by FIIAPP. SISCA area of thematic intervention is the social policy in Central America.

⁹ <https://www.fiiapp.org/>

¹⁰ <https://iila.org/es/>

¹¹ <https://www.expertisefrance.fr/>

¹² <https://www.sisca.int/>

1.2.4 Geographical focus

EUROsociAL+ is implemented in the Latin America region as defined in the EU Development Cooperation Instrument, benefiting from the Multi-indicative Regional programme for Latin America (DCI 2014-2020)¹³. Activities take place in all 18 eligible Latin America countries¹⁴.

In 2019, Dominican Republic joined the EUROsociAL+ initiative, becoming the only Caribbean country where the programme intervenes. It was done through a specific parallel contract financed in the context of the bilateral cooperation with this country¹⁵.

The programme coordination tasks take place in Europe. The programme office is based in Madrid, Spain.

1.3 Stakeholders of the Intervention

The key actors of this programme are, on the one hand, the policy makers responsible for the strategic decisions on public policies and the technical professionals in charge of their implementation. On the other hand, there are public administrations in beneficiary countries which carry out the Programme's activities associated with the implementation of the Programme.

Intellectuals, politicians, members of Parliament, representatives and institutions of civil society, who participate directly or indirectly to social cohesion policies with public or private funds, can also be considered as relevant actors for the Programme.

Non-governmental organizations, in particular women's organizations and feminist movements and the partnerships they have formed within and outside the scope of the State, have played a fundamental role in gender equality and achieving progress towards the objectives set in the international and regional commitments. Civil society also plays a crucial role for the states to hold accountable for meeting their gender equality commitments. The final beneficiaries are the inhabitants of Latin American countries, particularly the most vulnerable, marginalised and poor segments of the population.

1.4 Other available information

- Result Oriented Monitoring (ROM) report (final report / April 2019)

2 DESCRIPTION OF THE EVALUATION ASSIGNMENT

Type of evaluation	MID TERM
Coverage	All program activities during the indicated period
Geographic scope	Latin America
Period to be evaluated	From 31/10/2016 to TODAY

¹³ The full text of the MIP can be found here: http://eeas.europa.eu/la/docs/mip_alr_vf_07_08_14_en.pdf

¹⁴ The 18 countries are: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay and Venezuela

¹⁵ CRIS ref. FED 2019/409-159; Budget 700.000 EUR; Starting day of activities: 03/09/2019 - End date of activities: 02/01/2022

2.1 Objectives of the evaluation

Systematic and timely evaluation of its programmes and activities is an established priority¹⁶ of the European Commission¹⁷. The focus of evaluations is on the **assessment of achievements**, the **quality** and the **results**¹⁸ of Interventions in the context of an evolving cooperation policy with an increasing emphasis on **result-oriented approaches and the contribution towards the implementation of the SDGs**.¹⁹

From this perspective, evaluations should **look for evidence of why, whether or how these results are linked to the EU intervention** and seek to **identify the factors driving or hindering progress**.

Evaluations should provide an understanding of the **cause and effect links** among: inputs and activities, and outputs, outcomes and impacts. Evaluations should serve accountability, decision making, learning and management purposes.

The main objectives of this evaluation are to provide the relevant services of the European Union, the interested stakeholders and the wider public with:

- an overall independent assessment of the past performance of the EUROsociAL+, paying particular attention to its intermediate results measured against its expected objectives; and the reasons underpinning such results;
- key lessons learned, conclusions and related recommendations in order to improve current and future interventions.

In particular, this evaluation will serve to understand the performance of the EUROsociAL+ programme, its enabling factors and those hampering a proper delivery of results.

The present mid-term evaluation is performed mid-way with respect of the overall cumulative implementation period of EUROsociAL+. It focuses on progress to date.

It will explain why progress is happening or is not happening as planned and provide recommendations to prepare new interventions, encompassing both a forward and backward-looking perspective.

The focus of this evaluations is on the assessment of achievements, the quality and the results²⁰ in the context of an evolving Programme focus, with an emphasis on result-oriented approaches and the contribution towards the support to the public policies to improve social cohesion in LA countries.

This evaluation will serve accountability, decision making, learning and management purposes.

¹⁶ COM(2013) 686 final “Strengthening the foundations of Smart Regulation – improving evaluation” - http://ec.europa.eu/smart-regulation/docs/com_2013_686_en.pdf; EU Financial regulation (art 27); Regulation (EC) No 1905/2000; Regulation (EC) No 1889/2006; Regulation (EC) No 1638/2006; Regulation (EC) No 1717/2006; Council Regulation (EC) No 215/2008

¹⁷ SEC (2007)213 “Responding to Strategic Needs: Reinforcing the use of evaluation”, https://ec.europa.eu/smart-regulation/docs/com_2013_686_en.pdf; SWD (2015)111 “Better Regulation Guidelines”, http://ec.europa.eu/smart-regulation/guidelines/docs/swd_br_guidelines_en.pdf; COM(2017) 651 final ‘Completing the Better Regulation Agenda: Better solutions for better results’, https://ec.europa.eu/info/sites/info/files/completing-the-better-regulation-agenda-better-solutions-for-better-results_en.pdf

¹⁸ Reference is made to the entire results chain, covering outputs, outcomes and impacts. Cfr. Regulation (EU) No 236/2014 “Laying down common rules and procedures for the implementation of the Union's instruments for financing external action” - https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/pdf/financial_assistance/ipa/2014/236-2014_cir.pdf

¹⁹ The New European Consensus on Development ‘Our World, Our Dignity, Our Future’, Official Journal 30th of June 2017. <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:C:2017:210:TOC>

²⁰ Reference is made to the entire results chain, covering outputs, outcomes and impacts. Cfr. Regulation (EU) No 236/2014 “Laying down common rules and procedures for the implementation of the Union's instruments for financing external action” - https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/pdf/financial_assistance/ipa/2014/236-2014_cir.pdf

The main users of this evaluation will be the relevant EU services (DEVCO and EU Delegations in the respective countries) and other stakeholders (partner institutions involved in the implementation of the interventions to be evaluated).

In particular, this evaluation will serve for the Commission services to prepare new interventions (under new 2021-2027 programming), based on the accurate analysis of the results achieved insofar by the programme, its likelihood to achieve its planned outcomes by the end of the intervention, and the analysis of its efficiency.

2.2 Requested services

2.2.1 Scope of the evaluation

To achieve its objectives, this evaluation will include 3 strands of activity. They are:

- (Strand 1) – To assess the results achieved insofar by EUROsociAL+ and -based on this analysis- verify the overall Logic of Intervention, assessing to what extent this continues to be consistent with its Overall Objectives and modalities of intervention.
- (Strand 2) – To analyse the overall efficiency of the EUROsociAL+ implementation, including an analysis of its operation and transaction costs.
- (Strand 3) – To conduct a wide consultation with key stakeholders to understand their present satisfaction with the results of EUROsociAL+ and envisage possible future hypothesis of collaboration.

This evaluation will be based on the analysis of 5 of the 6 DAC criteria, namely: relevance, coherence, effectiveness, efficiency, and perspectives of sustainability. In consideration of the fact that this evaluation will be conducted remotely, the analysis of early signs of impact is not requested as such. However, evaluators are invited to share any early sign of impact they might encounter during the conduction of their work.

In addition, the evaluation will assess one EU specific evaluation criterion, which is the EU added value.

The definition of the 5 DAC + 1 EU evaluation criteria is contained for reference in the Annex VII.

The evaluation team shall furthermore consider whether and how gender was mainstreamed; the relevant SDGs and their interlinkages were identified; the principle of Leave No-One Behind and the rights-based approach methodology was followed in the identification/formulation documents and the extent to which they have been reflected in the implementation of the Intervention, its governance and monitoring.

2.2.2 Indicative Evaluation Questions

The specific Evaluation Questions as formulated below are indicative. Based on the latter and following initial consultations and document analysis, the evaluation team will discuss them with the Evaluation Manager²¹ and propose in their Inception Report a complete and finalised set of Evaluation Questions with indication of specific Judgement Criteria and Indicators, as well as the relevant data collection sources and tools.

Once agreed through the approval of the Inception Report, the Evaluation Questions will become contractually binding. Indicatively, each evaluation question will refer to one of the evaluation criteria.

²¹ The Evaluation Manager is the staff of the Contracting Authority managing the evaluation contract.

Question 1 – Is the intervention doing the right things? Are EUROsociAL+ interventions in line with the respective countries priorities and needs related to social cohesion and the respective government agenda and development plans? Are they correctly identified and designed?

Question 2 – How well does the intervention fit? Are EUROsociAL+ interventions complementary to other cooperation interventions? Are the other interventions (as Spotlight Initiative or SOCIEUX) taking into account EUROsociAL+ interventions?

Question 3 – Is the intervention achieving its objectives? Based on data registered in the programme monitoring platform and direct verifications, are the ongoing and completed EUROsociAL+ interventions achieving the planned results?

Question 4 – How well are Programme resources being used? Are activities related to EUROsociAL+’ interventions carried out efficiently, in time and at the planned costs?

Question 5 – Will the benefits last? Are direct results from EUROsociAL+ projects and actions under implementation or implemented, likely to persist after the external assistance ends?

Question 6 – How relevant is a regional programme on social cohesion? Is there any added value of EUROsociAL+ as a regional programme, as opposed to a sum of national/bilateral ones?

Question 7 – Which is the EU added value in EUROsociAL+? Is the joint effort of several EU member states under the leadership of the EU, producing multiplying effects with respect of single actor similar interventions?

2.2.3 Sampling

EUROsociAL+ is currently implemented in 19 countries and conducts about 300 actions to support public policies. Although general aspects of the evaluation will focus on the entire universe of programme activities, in depth analysis will have to be restricted to a limited number of countries (indicatively 6 countries). After the Inception Phase, in close concertation with the European Commission, the number and countries to be selected will be determined. With this respect, the following focus of the evaluation is foreseen for the three strands:

- Strand 1: analysis of progresses to date in all countries based on secondary sources analysis + in-depth analysis in a limited number of countries to be defined in the Inception Report
- Strand 2: as above
- Strand 3: a significant sample of Programme stakeholders to be consulted will also be defined at the inception stage, on the basis of evaluators’ proposals.

2.3 Phases of the evaluation and required outputs

In consideration of the present COVID-19 pandemic, this evaluation will be conducted remotely, without field phase. The evaluation process will therefore be carried out in four phases:

- Inception
- Desk (general and in depth)
- Synthesis
- Dissemination

The outputs of each phase are to be submitted at the end of the corresponding phases as specified in the synoptic table in section 2.3.1.

2.3.1 Synoptic table

The following table presents an overview of the key activities to be conducted within each phase and lists the outputs to be produced by the team as well as the key meetings with the Contracting Authority and the Reference Group. The main content of each output is described in Chapter **Error! Reference source not found.**

Phases of the evaluation	Key activities	Outputs and meetings
<u>Inception Phase</u>	<ul style="list-style-type: none"> • Initial document/data collection • Background analysis • Inception interviews [as relevant] • Stakeholder analysis • Systematization of the Intervention Logic in view of the evaluation • Methodological design of the evaluation (Evaluation Questions with judgement criteria, indicators and methods of data collection and analysis) and evaluation matrix • Sample definition for in depth analysis 	<ul style="list-style-type: none"> • <i>Kick-off meeting with the Contracting Authority and the Reference Group</i> [in Brussels or via remote conference according to circumstances] • Inception report • Slide presentation of the Inception Report contents
<u>Desk Phase (general)</u>	<ul style="list-style-type: none"> • Full document analysis (focused on the Evaluation Questions) • Interviews (remote) with the main concerned stakeholders (DEVCO, Implementing Agencies, sample countries National Focal Points and EU Delegations) • Identification of information gaps and of hypotheses to be tested in the field phase • Methodological design of the Field Phase 	<ul style="list-style-type: none"> • Desk Note • Slide presentation of key findings of the desk phase • <i>Meeting with Reference Group</i> [face-to-face or via remote conference, according to circumstances].
<u>Desk Phase (in depth)</u>	<ul style="list-style-type: none"> • Gathering of primary evidence on the sample interventions, with the use of interviews, focus groups, storytelling sessions, surveys etc. (as proposed in the desk phase) – all the above conducted remotely • In depth data collection and analysis (linked to the hypotheses to be tested in the field and in view of filling the information gaps defined during the desk phase) 	<ul style="list-style-type: none"> • Meetings (remote) with projects and actions implementers and counterparts • Note, summarizing activities carried out and obstacles encountered (if any) • Slide Presentation of key findings of the field phase (support to the debriefing sessions) <i>Debriefing with the Reference Group</i> [face-to-face or via remote conference, according to circumstances]

Phases of the evaluation	Key activities	Outputs and meetings
<u>Synthesis phase</u>	<ul style="list-style-type: none"> • Final analysis of findings (with focus on the Evaluation Questions) • Formulation of the overall assessment, conclusions and recommendations • Reporting 	<ul style="list-style-type: none"> • Draft Final Report • Executive Summary according to the standard template published in the EVAL module • Final Report • Slide presentation • <i>Meeting with Reference Group</i>[face-to-face or via remote conference, according to circumstances]
<u>Dissemination phase</u>	<ul style="list-style-type: none"> • Organisation of the final presentation seminar 	<ul style="list-style-type: none"> • <i>Final presentation seminar</i> with main Programme stakeholders [modality according to circumstances]

2.3.2 Inception Phase

This phase aims at structuring the evaluation and clarifying the key issues to be addressed.

The phase will start with a kick-off session [via videoconference] between DEVCO G2 (future INTPA B2)²² and the evaluators. Half-day participation of the evaluators Team Leader is required. The meeting aims at arriving at a clear and shared understanding of the scope of the evaluation, its limitations and feasibility. It also serves to clarify expectations regarding evaluation outputs, the methodology to be used and, where necessary, to pass on additional or latest relevant information.

In the Inception phase, the relevant documents will be reviewed (see annex II). Further to a first review of the political, institutional and/or technical/cooperation framework of EU support to social cohesion in Latin America, the evaluation team, in consultation with the Evaluation Manager, will revise the Intervention Logic of the Intervention in view of the evaluation.

Furthermore, based on the Intervention Logic, the evaluators will develop a narrative explanation of the logic of the Intervention that describes how change is expected to happen within the Intervention, all along its results chain, i.e. Theory of Change.

Based on the Intervention Logic and the Theory of Change the evaluators will finalise i) the Evaluation Questions with the definition of judgement criteria and indicators, the selection of data collection tools and sources, ii) the evaluation methodology (including sampling methods for in depth analysis), and iii) the planning of the following phases.

The methodological approach will be represented in an Evaluation Design Matrix²³, which will be included in the Inception Report. **The methodology of the evaluation should be gender sensitive, contemplate the use of sex- and age-disaggregated data and demonstrate how actions have contributed to progress on gender equality.**

The limitations faced or to be faced during the evaluation exercise will be discussed and mitigation measures described in the Inception Report. Finally, the work plan for the overall evaluation process will be presented and agreed in this phase; this work plan shall be in line with that proposed in the present ToR. Any modifications shall be justified and agreed with the Evaluation Manager.

²² New name and organigram will enter into force on 16/01/2021.

²³ The Evaluation Matrix is a tool to structure the evaluation analysis (by defining judgement criteria and indicators for each evaluation question). It helps also to consider the most appropriate and feasible data collection method for each of the questions,

On the basis of the information collected, the evaluation team should prepare an **Inception Report**; its content is described in Chapter **Error! Reference source not found.**

2.3.3 Desk Phase

This phase is when the full document analysis takes place. The analysis of the relevant documents shall be systematic and reflect the methodology developed and approved during the Inception Phase.

Selected interviews (remote) with the main concerned stakeholders (DEVCO/INTPA, Implementing Agencies, sample countries National Focal Points and EU Delegations) may be conducted during this phase to support the analysis of secondary sources.

The activities to be conducted during this phase should allow for the provision of preliminary responses to each evaluation question, stating the information already gathered and its limitations. They will also identify the issues still to be covered and the preliminary hypotheses to be tested.

During this phase, the evaluation team shall fine-tune the evaluation tools to be used during the following in-depth analysis Phase and describe the preparatory steps already taken and those to be taken for its organisation, including the list of people to be interviewed, dates of meetings (virtual), and attribution of tasks within the team.

At the end of the general desk phase a first **Desk Note** will be prepared. Its content is described in Chapter **Error! Reference source not found.**

A presentation by the evaluation team to the Reference Group, will take place in [remotely]. The presence of the entire evaluation team is required.

In depth desk analysis on sample interventions, using remote consultation methods

The second part of the desk phase aims at validating / changing the preliminary answers formulated during the first part of the Desk phase and further completing information through in depth analysis of sample specific interventions.

If any significant deviation from the agreed work plan or schedule is perceived as creating a risk for the quality of the evaluation or not respecting the end of the validity of the specific contract, these elements are to be immediately discussed with the Evaluation Manager and, regarding the validity of the contract, corrective measures undertaken.

During the in depth phase, the evaluation team shall ensure adequate contact and consultation with, and involvement of the relevant government authorities, in particular the program's National Focal Points. Throughout their work the evaluation team will use the most reliable and appropriate sources of information, respect the rights of individuals to provide information in confidence, and be sensitive to the beliefs and customs of local social and cultural environments.

At the end of the in depth desk phase an **Intermediary Note** will be prepared. Its content is described in Chapter **Error! Reference source not found.**

2.3.4 Synthesis Phase

This phase is devoted to the preparation by the contractor of **two distinct documents**: the **Executive Summary** and the **Final Report**, whose structures are described in the Annex III; it entails the analysis of the data collected during the desk and field phases to answer the Evaluation Questions and preparation of the overall assessment, conclusions and recommendations of the evaluation.

The evaluation team will present, in a single Report with Annexes, their findings, conclusions and recommendations in accordance with the structure in Annex III; a separate Executive Summary will be produced as well, following the compulsory format given in the EVAL module (see Annex III).

The evaluation team will make sure that:

- Their assessments are objective and balanced, statements are accurate and evidence-based, and recommendations realistic and clearly targeted.
- When drafting the report, they will acknowledge clearly where changes in the desired direction are known to be already taking place.
- The wording, inclusive of the abbreviations used, takes into account the audience as identified in art. 2.1 above.

The evaluation team will deliver and then present in a meeting (virtual) the **Draft Final Report** to the Reference Group to discuss the draft findings, conclusions and recommendations. Participation is required of all team members.

The Evaluation Manager consolidates the comments expressed by the Reference Group members and sends them to the evaluation team for the report revision, together with a first version of the Quality Assessment Grid (QAG) assessing the quality of the Draft Final Report. The content of the QAG will be discussed with the evaluation team to verify if further improvements are required, and the evaluation team will be invited to comment on the conclusions formulated in the QAG (through the EVAL Module).

The evaluation team will then finalise the **Final Report** and the **Executive Summary** by addressing the relevant comments. While potential quality issues, factual errors or methodological problems should be corrected, comments linked to diverging judgements may be either accepted or rejected. In the latter instance, the evaluation team must explain the reasons in writing. After approval of the final report, the QAG will be updated and sent to the evaluators via EVAL Module.

2.3.5 Dissemination phase

Appropriate feedback mechanisms will be organized by the evaluators so that the evaluation results are transmitted to all persons responsible for decision-making, organisational learning, accountability/transparency and efficient resource allocation and information reaches all interested parties.

The dissemination of the results of evaluation and capitalisation of results will be assured through a dissemination seminar to which relevant available programme stakeholders will be invited to attend.

The dissemination seminar of the evaluation Report will take place remotely, with the participation of the evaluation team.

2.4 Specific Contract Organisation and Methodology (Technical offer)

The invited Framework Contractors shall make provision for the use of the following methods of analysis:

- Strand 1) The analysis of the progresses to date based on secondary sources will be based on the methodology proposed by the consultants. The in-depth analysis of a significant sample of Programme interventions, will be based on a series of remote Outcome

Harvesting sessions, or on similar techniques allowing to reconstruct backwards the present Logic of Intervention of EUROsociAL+ from the analysis of the verifiable changes brought in by the programme.

- Strand 2) The consultants will propose the method of analysis they consider appropriate to the scope.
- Strand 3) The consultants will use an approach and techniques allowing to develop multiple and alternative scenarios. This will be based on a wide remote consultation where the different scenarios preferred by stakeholders can be documented and the preferred options tracked back to the different stakeholder groups, per country and at regional level. The use of a methodology based on approaches such ParEvo or Delphi or similar ones are requested and the selection duly justified in the specific contract organisation and methodology.

The invited Framework Contractors will submit their specific Contract Organisation and Methodology by using the standard SIEA template B-VII-d-i and its annexes 1 and 2 (B-VII-d-ii).

The evaluation methodology proposed to undertake the assignment will be described in the Chapter 3 (Strategy and timetable of work) of the template B-VII-d-i. Contractors will describe how their proposed methodology will address the cross-cutting issues mentioned in these Terms of Reference and notably gender equality and the empowerment of women. This will include the communication action messages, materials and management structures.

By derogation of what is specified in the standard SIEA template B-VII-d-i, the maximum length of the specific Contract Organisation and Methodology is 8 pages, written in Times New Roman 12 or Arial size 11, single interline, excluding the framework contractor's own annexes (maximum length of such annexes: 3 pages), additional to the Annexes foreseen as part of the present Specific ToRs. The timetable is not accounted and may be presented on an A3 page.

2.5 Management and Steering of the evaluation

2.5.1 At the EU level

The evaluation is managed by the Evaluation Manager of the Unit DEVCO G2 (INTPA B2). The progress of the evaluation will be followed closely with the assistance of a Reference Group consisting of members of DEVCO G2, G1, G3 and B3.

The main functions of the Reference Group are:

- To define and validate the Evaluation Questions.
- To facilitate contacts between the evaluation team and the EU services and external stakeholders.
- To ensure that the evaluation team has access to and has consulted all relevant information sources and documents related to the Intervention.
- To discuss and comment on notes and reports delivered by the evaluation team. Comments by individual group members are compiled into a single document by the Evaluation Manager and subsequently transmitted to the evaluation team.
- To assist in feedback on the findings, conclusions, lessons and recommendations from the evaluation.
- To support the development of a proper follow-up action plan after completion of the evaluation.

2.5.2 At the Contractor level

Further to the Requirements set in the art. 6 of the Global Terms of Reference and in the Global Organisation and Methodology, respectively annexes II and III of the Framework contract SIEA 2018, the contractor is responsible for the quality of: the process; the evaluation design; the inputs and the outputs of the evaluation. In particular, it will:

- Support the Team Leader in its role, mainly from a team management perspective. In this regard, the contractor should make sure that, for each evaluation phase, specific tasks and outputs for each team member are clearly defined and understood.
- Provide backstopping and quality control of the evaluation team's work throughout the assignment.
- Ensure that the evaluators are adequately resourced to perform all required tasks within the time framework of the contract.

3 LOGISTICS AND TIMING

Please refer to Part B of the Terms of Reference.

3.1 Planning, including the period for notification for placement of the staff²⁴

As part of the technical offer, the framework contractor must fill in the timetable in the Annex IV. The 'Indicative dates' are not to be formulated as fixed dates but rather as days (or weeks, or months) from the beginning of the assignment (to be referenced as '0').

Sufficient forward planning is to be taken into account in order to ensure the active participation and consultation with government representatives, national / local or other stakeholders.

4 REQUIREMENTS

Please refer to Part B of the Terms of Reference.

5 REPORTS

For the list of reports, please refer to Part B of the Terms of Reference.

5.1 Use of the EVAL module by the evaluators

It is strongly recommended that the **submission of deliverables** by the selected contractor **be performed through their uploading in the EVAL Module**, an evaluation process management tool and repository of the European Commission. The selected contractor will receive access to online and offline guidance in order to operate with the module during the related Specific contract validity.

5.2 Number of report copies

Apart from their submission -preferably via the EVAL Module-, the approved version of the Final Report will be also provided in **6** paper copies and in electronic version at no extra cost.

²⁴ As per art 16.4 a) of the General Conditions of the Framework Contract SIEA

5.3 Formatting of reports

All reports will be produced using Font Arial or Times New Roman minimum letter size 11 and 12 respectively, single spacing, double sided. They will be sent in Word and PDF formats.

6 MONITORING AND EVALUATION

6.1 Content of reporting

The outputs must match quality standards. The text of the reports should be illustrated, as appropriate, with maps, graphs and tables; a map of the area(s) of Intervention is required (to be attached as Annex).

6.2 Comments on the outputs

For each report, the Evaluation Manager will send to the Contractor consolidated comments received from the Reference Group or the approval of the report within 30 calendar days. The revised reports addressing the comments shall be submitted within 15 calendar days from the date of receipt of the comments. The evaluation team should provide a separate document explaining how and where comments have been integrated or the reason for not integrating certain comments, if this is the case.

6.3 Assessment of the quality of the Final Report and of the Executive Summary

The quality of the draft versions of the Final Report and of the Executive Summary will be assessed by the Evaluation Manager using the online Quality Assessment Grid (QAG) in the EVAL Module (text provided in Annex V). The Contractor is given – through the EVAL module - the possibility to comment on the assessments formulated by the Evaluation Manager. The QAG will then be reviewed following the submission of the final version of the Final Report and of the Executive Summary.

The compilation of the QAG will support/inform the compilation by the Evaluation Manager of the FWC SIEA's Specific Contract Performance Evaluation.

7 PRACTICAL INFORMATION

Please address any request for clarification and other communication to the following addresses:

Laure@Roges@ec.europa.eu and Anna.Herrero@ec.europa.eu

ANNEXES TO TOR - PART A

ANNEX I: SPECIFIC TECHNICAL EVALUATION CRITERIA

SPECIFIC TECHNICAL EVALUATION CRITERIA

Request for Services n. 1737

FWC SIEA 2018 - LOT 4: Human development and safety net

EuropeAid/138778/DH/SER/multi

1. TECHNICAL EVALUATION CRITERIA

The Contracting Authority selects the offer with the best value for money using an 80/20 weighting between technical quality and price²⁵.

Technical quality is evaluated on the basis of the following grid:

Criteria	Maximum
<i>Total score for Organisation and Methodology</i>	50
<ul style="list-style-type: none">Understanding of ToR and the aim of the services to be provided	10
<ul style="list-style-type: none">Overall methodological approach, quality control approach, appropriate mix of tools and estimate of difficulties and challenges	25
<ul style="list-style-type: none">Technical added value, backstopping and role of the involved members of the consortium	5
<ul style="list-style-type: none">Organisation of tasks including timetable	10
<i>Score for the expertise of the proposed team</i>	50
OVERALL TOTAL SCORE	100

2. TECHNICAL THRESHOLD

Any offer falling short of the technical threshold of 75 out of 100 points, is automatically rejected.

3. INTERVIEWS DURING THE EVALUATION OF THE OFFERS

During the evaluation process of the offers received the Contracting Authority reserves the right to interview by phone one or several members of the proposed evaluation teams.

²⁵ For more details about the 80/20 rule, please see the PRAG, chapter 3.3.10.5 - https://ec.europa.eu/europeaid/funding/about-funding-and-procedures/procedures-and-practical-guide-prag_en

ANNEX II: INFORMATION THAT WILL BE PROVIDED TO THE EVALUATION TEAM

- Legal texts and political commitments pertaining to the Intervention to be evaluated
- Regional Strategy Paper and Indicative Programmes for the periods covered
- Relevant national / sector policies and plans from National and Local partners and other donors
- Intervention identification studies
- Intervention feasibility / formulation studies
- Intervention financing agreement and addenda
- Intervention's annual progress reports, and technical reports
 - Annual Progress Reports
 - Annual Workplans
 - Access to SOFIE monitoring platform
 - “Marco de Gestión por Resultados”(linked with the EU Results Framework, the EU Gender Action Plan 2 and the Sustainable Development Goals / Agenda 2030)
- European Commission's Result Oriented Monitoring (ROM) Reports, and other external and internal monitoring reports of the Intervention
 - ROM Report 2019
- Intervention's mid-term evaluation report (not available) and other relevant evaluations, audit, reports
- Relevant documentation from National/Local partners and other donors
- Guidance for Gender sensitive evaluations
- Calendar and minutes of all the meeting of the Steering Committee of the Intervention(s)
- Any other relevant document

Note: The evaluation team has to identify and obtain any other document worth analysing, through independent research and during interviews with relevant informed parties and stakeholders of the Intervention.

ANNEX III: STRUCTURE OF THE FINAL REPORT AND OF THE EXECUTIVE SUMMARY

The contractor will deliver – **preferably through their uploading in the EVAL Module - two distinct documents**: the **Final Report** and the **Executive Summary**. They must be consistent, concise and clear and free of linguistic errors both in the original version and in their translation – if foreseen.

The Final Report should not be longer than the number of pages indicated in Chapter 6. Additional information on the overall context of the Intervention, description of methodology and analysis of findings should be reported in an Annex to the main text.

The presentation must be properly spaced and the use of clear graphs, tables and short paragraphs is strongly recommended.

The cover page of the Final Report shall carry the following text:

“This evaluation is supported and guided by the European Commission and presented by [name of consulting firm]. The report does not necessarily reflect the views and opinions of the European Commission”.

Executive Summary

A short, tightly-drafted, to-the-point and free-standing Executive Summary. It should focus on the key purpose or issues of the evaluation, outline the main analytical points, and clearly indicate the main conclusions, lessons to be learned and specific recommendations. It is to be prepared by using the specific format foreseen in the EVAL Module.

The main sections of the evaluation report shall be as follows:

1. Introduction

A description of the Intervention, of the relevant country/region/sector background and of the evaluation, providing the reader with sufficient methodological explanations to gauge the credibility of the conclusions and to acknowledge limitations or weaknesses, where relevant.

2. Answered questions / Findings

A chapter presenting the answers to the Evaluation Questions, supported by evidence and reasoning.

3. Overall assessment (optional)

A chapter synthesising all answers to Evaluation Questions into an overall assessment of the Intervention. The detailed structure of the overall assessment should be refined during the evaluation process. The relevant chapter has to articulate all the findings, conclusions and lessons in a way that reflects their importance and facilitates the reading. The structure should not follow the Evaluation Questions, the logical framework or the evaluation criteria.

4. Conclusions and Recommendations

4.3 Lessons learnt

Lessons learnt generalise findings and translate past experience into relevant knowledge that should support

decision making, improve performance and promote the achievement of better results. Ideally, they should support the work of both the relevant European and partner institutions.

4.1 Conclusions

This chapter contains the conclusions of the evaluation, organised per evaluation criterion.

In order to allow better communication of the evaluation messages that are addressed to the Commission, a table organising the conclusions by order of importance can be presented, or a paragraph or sub-chapter emphasizing the 3 or 4 major conclusions organised by order of importance, while avoiding being repetitive.

4.2 Recommendations

They are intended to improve or reform the Intervention in the framework of the cycle under way, or to prepare the design of a new Intervention for the next cycle.

Recommendations must be clustered and prioritised, and carefully targeted to the appropriate audiences at all levels, especially within the Commission structure.

5. Annexes to the report

The report should include the following annexes:

- The Terms of Reference of the evaluation
- The names of the evaluators (CVs can be shown, but summarised and limited to one page per person)
- Detailed evaluation methodology including: options taken, difficulties encountered and limitations; detail of tools and analyses.
- Evaluation Matrix
- Intervention logic / Logical Framework matrices (planned/real and improved/updated)
- Relevant geographic map(s) where the Intervention took place
- List of persons/organisations consulted
- Literature and documentation consulted
- Other technical annexes (e.g. statistical analyses, tables of contents and figures, matrix of evidence, databases) as relevant
- Detailed answer to the Evaluation Questions, judgement criteria and indicators

ANNEX IV: PLANNING SCHEDULE

This annex must be included by Framework Contractors in their Specific Contract Organisation and Methodology and forms an integral part of it. Framework Contractors can add as many rows and columns as needed.

The phases of the evaluation shall reflect those indicated in the present Terms of Reference.

		Indicative Duration in working days ²⁶		
Activity	Location	Team Leader	Evaluator ...	Indicative Dates
Inception phase: total days				
•				
•				
Desk phase: total days				
•				
•				
Field phase: total days				
•				
•				
Synthesis phase: total days				
•				
•				
Dissemination phase: total days				
•				
•				
TOTAL working days (maximum)				

²⁶ Add one column per each evaluator

ANNEX V: QUALITY ASSESSMENT GRID

The quality of the Final Report will be assessed by the Evaluation Manager (since the submission of the draft Report and Executive Summary) using the following quality assessment grid, which is included **in the EVAL Module**; the grid will be shared with the evaluation team, which will have the possibility to include their comments.

Intervention (Project/Programme) evaluation – Quality Assessment Grid Final Report

Evaluation data			
Evaluation title			
Evaluation managed by		Type of evaluation	
Ref. of the evaluation contract		EVAL ref.	
Evaluation budget			
EUD/Unit in charge		Evaluation Manager	
Evaluation dates	Start:		End:
Date of draft final report		Date of Response of the Services	
Comments			
Project data			
Main project evaluated			
CRIS/OPSYS # of evaluated project(s)			
DAC Sector			
Contractor's details			
Evaluation Team Leader		Evaluation Contractor	
Evaluation expert(s)			

Legend: scores and their meaning

Very satisfactory: criterion entirely fulfilled in a clear and appropriate way

Satisfactory: criterion fulfilled

Unsatisfactory: criterion partly fulfilled

Very unsatisfactory: criterion mostly not fulfilled or absent

The evaluation report is assessed as follows

1. Clarity of the report

This criterion analyses the extent to which both the Executive Summary and the Final Report:

- Are easily readable, understandable and accessible to the relevant target readers
- Highlight the key messages
- The length of the various chapters and annexes of the Report are well balanced
- Contain relevant graphs, tables and charts facilitating understanding
- Contain a list of acronyms (only the Report)
- Avoid unnecessary duplications
- Have been language checked for unclear formulations, misspelling and grammar errors
- The Executive Summary is an appropriate summary of the full report and is a free-standing document



Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	

2. Reliability of data and robustness of evidence

This criterion analyses the extent to which:

- Data/evidence was gathered as defined in the methodology
- The report considers, when relevant, evidence from EU and/or other partners' relevant studies, monitoring reports and/or evaluations
- The report contains a clear description of the limitations of the evidence, the risks of bias and the mitigating measures



Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	


3. Validity of Findings

This criterion analyses the extent to which:

- Findings derive from the evidence gathered
- Findings address all selected evaluation criteria
- Findings result from an appropriate triangulation of different, clearly identified sources



<ul style="list-style-type: none"> When assessing the effect of the EU intervention, the findings describe and explain the most relevant cause/effect links between outputs, outcomes and impacts The analysis of evidence is comprehensive and takes into consideration contextual and external factors 		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	
4. Validity of conclusions		
<p>This criterion analyses the extent to which:</p> <ul style="list-style-type: none"> Conclusions are logically linked to the findings, and go beyond them to provide a comprehensive analysis Conclusions appropriately address the selected evaluation criteria and all the evaluation questions, including the relevant cross-cutting dimensions Conclusions take into consideration the various stakeholder groups of the evaluation Conclusions are coherent and balanced (i.e. they present a credible picture of both strengths and weaknesses), and are free of personal or partisan considerations (If relevant) whether the report indicates when there are not sufficient findings to conclude on specific issues 		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	
5. Usefulness of recommendations		
<p>This criterion analyses the extent to which the recommendations:</p> <ul style="list-style-type: none"> Are clearly linked to and derive from the conclusions Are concrete, achievable and realistic Are targeted to specific addressees Are clustered (if relevant), prioritised, and possibly time-bound (If relevant) provide advice for the Intervention's exit strategy, post-Intervention sustainability or for adjusting Intervention's design or plans 		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	

6. Appropriateness of lessons learnt analysis <i>(if requested by the ToR or included by the evaluators)</i>		
This criterion is to be assessed only when requested by the ToR or included by evaluators and is not to be scored. It analyses the extent to which: <ul style="list-style-type: none"> • Lessons are identified • When relevant, they are generalised in terms of wider relevance for the institution(s) 		
Strengths	Weaknesses	
Contractor's comments	Contractor's comments	
Final comments on the overall quality of the report		Overall score

ANNEX VI: LOGICAL FRAMEWORK MATRIX (LOGFRAME) OF THE EVALUATED ACTION(S)

- The Programme has been designed without a Logical Framework (LF) as it is implemented through a demand driven approach.
- “Marco de Gestión por Resultados
- Annex I of the contract - “Descripción de la Acción”

ANNEX VII: THE EVALUATION CRITERIA

The definition and the number of the DAC evaluation criteria has changed following the release (10 December 2019) of the document “Evaluation Criteria: Adapted Definitions and Principles for Use” (DCD/DAC(2019)58/FINAL).

The evaluators will ensure that their analysis will respect the new definitions of these criteria and their explanatory notes. Reference and guidance documents are being developed and can be found here: <https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

Unless otherwise specified in the chapter 2.2.1, the evaluation will assess the Intervention using the six standard DAC evaluation criteria and the EU added value, which is a specific EU evaluation criterion. Their definitions are reported below:

DAC CRITERIA

- **Relevance:** the “extent to which the intervention objectives and design respond to beneficiaries’, global, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change.”
- **Coherence:** the “compatibility of the intervention with other interventions in a country, sector or institution.”
- **Effectiveness:** the “extent to which the intervention achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups.”
- **Efficiency:** the “extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way.”
- **Impact:** the “extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.”
- **Sustainability:** the “extent to which the net benefits of the intervention continue or are likely to continue.”

EU-SPECIFIC CRITERION

- **EU added value:** the extent to which the Intervention brings additional benefits to what would have resulted from Member States' interventions only in the partner country. It directly stems from the principle of subsidiarity defined in the Article 5 of the Treaty on European Union (<https://www.europarl.europa.eu/factsheets/en/sheet/7/the-principle-of-subsidiarity>).

TERMS OF REFERENCE – PART B

BACKGROUND INFORMATION

1. Benefitting Zone

Latin America Countries

2. Contracting authority

The European Union, represented by the European Commission, B-1049 Brussels, Belgium.

3. Contract language

English

LOCATION AND DURATION

4. Location

- **Team Leader:**
 - Normal place of posting of the specific assignment: Home-based
 - Mission(s) outside the normal place of posting and duration(s): Not foreseen
- **Gender Expert:**
 - Normal place of posting of the specific assignment: Home-based
 - Mission(s) outside the normal place of posting and duration(s): Not foreseen
- **Junior Expert:**
 - Normal place of posting of the specific assignment: Home-based
 - Mission(s) outside the normal place of posting and duration(s): Not foreseen

5. Start date and period of implementation

The indicative start date is 01/02/2021 and the period of implementation of the contract will be 150 days from this date (indicative end date: 01/07/2021).

REQUIREMENTS

6. Expertise

For this assignment, one individual expert must be proposed for each position.

The expertise required for the implementation of the specific contract is detailed below.

- **Team Leader:**

- General description of the position: Responsible for the overall coordination of the evaluation.
- Expert category: Cat. I (>12 years of experience)
- Qualifications and skills required: PhD or Master's degree in social sciences, economics, law, engineering, international relations or development studies.
- General professional experience: - Extensive and relevant experience (minimum 15 years) in the field of development cooperation. - Extensive and relevant professional experience in project/programme evaluation programmes in the field of EUROsociAL+ actions (Social policies, Democratic Governance and Gender Equity).
- Specific professional experience: - At least 8 years of professional experience in projects/programmes evaluation, preferably in EC programmes and projects evaluation. - At least 10 years of professional experience in/with Latin America. - Excellent knowledge of EC procedures and informatics applications, including financial and contractual management.
- Language skills: Proficiency in English and Spanish. Working knowledge of Portuguese desirable.
- Minimum number of working days: **80** days
- Additional information: The candidate for this position needs to have a proven experience in evaluating complex programmes involving several agencies.
- **Gender Expert:**
 - General description of the position: Responsible for assessing the gender-related component of the programme.
 - Expert category: Cat. I (>12 years of experience)
 - Qualifications and skills required: PhD or Master's degree in social sciences, economics, law, international relations or development studies.
 - General professional experience: - At least 10 years of experience in development cooperation. - Extensive and relevant professional experience in project/programme evaluation programmes in the field of EUROsociAL+ actions (Social policies, Democratic Governance and in particular in Gender Equity). - At least 6 years of professional experience in/with Latin America.
 - Specific professional experience: - Proven experience and knowledge in Gender Equity in the international cooperation framework. - At least 5 years of professional experience in projects/programmes evaluation, preferably in EC programmes and projects evaluation.
 - Language skills: Proficiency in English and Spanish. Working knowledge of Portuguese desirable.
 - Minimum number of working days: **70** days

- **Junior Expert:**

- General description of the position: Junior Expert
- Expert category: Cat. III (>3 years of experience)
- Qualifications and skills required: PhD or Master's degree in social sciences, economics, law, international relations or development studies.
- General professional experience: - At least 5 years of experience in development cooperation. - Relevant professional experience in project/programme evaluation programmes in the field of EUROsociAL+ actions (Social policies, Democratic Governance and Gender Equity).
- Specific professional experience: - Relevant professional experience in/with Latin America. - Professional experience with projects/programmes evaluation.
- Language skills: Proficiency in English and Spanish. Working knowledge of Portuguese desirable.
- Minimum number of working days: **70** days
- Additional information: Field experience is an asset.

7. Incidental expenditure

No incidental expenditure provided for in this contract.

8. Lump sums

No lump sums provided for in this contract.

9. Expenditure verification

No expenditure verification report is required.

10. Other details

1 - The minimum requirements covered by the team of experts as a whole are detailed below: - The composition of the team of experts should be balanced to enable complete coverage of the different aspects of the study as set out in these terms of reference (Social policies, Democratic governance Gender equity) including cross-cutting issues. - Excellent reporting and synthesis skills. - At least one member of the team has to have demonstrable experience in leading Outcome Harvesting-based evaluations AND in conducting large-scale remote consultations based on Delphi method, ParEvo or similar multi-scenario analysis tools. - At least one member of the team has to have working knowledge in Portuguese

Minimum quantity (if applicable): 1

REPORTS AND DELIVERABLES

11. Reports and deliverables requirements

Title	Content	Language	Submission timing or deadline
Inception report	<ul style="list-style-type: none"> - Intervention logic - Stakeholder map - Methodology for the evaluation, incl.: <ul style="list-style-type: none"> o Evaluation Matrix: Evaluation Questions, with judgement criteria and indicators, and data analysis and collection methods o Consultation strategy - Analysis of risks related to the evaluation methodology and mitigation measures - Work plan 	English	Within 1 Month(s) After the project start
Desk report	<ul style="list-style-type: none"> - Preliminary answers to each Evaluation Question, with indication of the limitations of the available information - Data gaps to be addressed, issues still to be covered and hypotheses to be tested during the in-depth consultations - Update of the in-depth consultation approach - Update of the work plan of the following activities 	English	Within 2 Month(s) After the project start
Draft final report	Cf. detailed structure in Annex III	English	Within 4 Month(s) After the project start
Draft Executive Summary – by using the EVAL online template	Cf. detailed structure in Annex III	English	Within 4 Month(s) After the project start
Final report	Same specifications as of the Draft Final Report, incorporating any comments received from the concerned parties on the draft report that	English	Within 5 Month(s) After the project start

Title	Content	Language	Submission timing or deadline
	have been accepted In English and Spanish		
Executive Summary – by using the EVAL online template	Same specifications as for the Draft Executive Summary, incorporating any comments received from the concerned parties on the draft report that have been accepted In English and Spanish	English	Within 5 Month(s) After the project start