

TERMS OF REFERENCE FOR THE CONSULTANCY:

Project methodologies and practice - assessment and learning exercise

Project Name	Support to CSO social service providers in Bosnia and Herzegovina
Country	Bosnia and Herzegovina (BiH)
Project Duration	July 2019 - September 2021
Project Budget	384,615.00 EUR
Donor	Austrian Development Agency (ADA)
Name of Organization	CARE Balkans

Deadline for application: Monday 19th, July 2021, 15h

1. Context and Background

CARE International is a federation of international non-government organizations implementing its programs for fighting poverty and social injustice in more than 90 countries throughout the world. CARE's aim in the Balkans is to ensure recognition and fulfilment of social, economic and political rights of the vulnerable and marginalized groups, thus contributing to sustainable peace in the region.

CARE's project "**Support to CSO social service providers in Bosnia and Herzegovina**" (continuation and complement to the project "*Enhancing Social Protection by Empowering CSO in Bosnia and Herzegovina*") co-funded by the Austrian Development Agency (ADA) and the Czech Development Cooperation and implemented between July 2019 and September 2021, is contributing to strengthening the weak social welfare, social protection, as well as access to rights and social inclusion for the marginalized and most vulnerable. The goal of the project is to professionalize and enhance the mandate and role of civil society actors (CSOs) in Bosnia and Herzegovina by increasing their sustainability and building their capacity to provide services for marginalized and vulnerable population and by enabling them to actively participate in design and implementation of relevant policies. The project is implemented by CARE, with vast experience in developing the capacity of CSOs and in policy advocacy in BiH.

The project **Overall objective** is to develop effective, sustainable, accountable and transparent civil society institutions in Bosnia and Herzegovina (BiH) working towards the empowerment and socio-economic inclusion of poor and marginalized groups. The **Specific Objective** is to strengthen the role of civil society actors in BiH in providing social services for marginalized populations and participate in the design and implementation of relevant policies.

Expected Results

Project partners:



- Organisational capacity, income generation capability and management of the target civil society organisations (CSOs) in BiH is strengthened, contributing to the achievement of SDG 1.3 and EU GAP II's Thematic Objective 18.
- Service provision of the target CSOs is improved to meet the needs of their target groups (people with disabilities, marginalized women, Roma people), contributing to the achievement of SDG 10.2.
- The target CSOs have strengthened their advocacy position and improved policies in specific areas of their mandate, contributing to the achievement of SDGs 1.B, 5.C and 10.4.

With the support from the project, the target organisations run social enterprises in different fields, employing marginalised population while funding their core activities from the business profit.

Target group/beneficiaries - the project is targeting the following 5 CSOs:

Budućnost Modriča, focused on the promotion and protection of women's and human rights and work on women economic empowerment.

Udruženje građana za promociju obrazovanja Roma "Otaharin", Bijeljina, engages in the socio-economic inclusion of Roma minority, including support to the inclusion of Roma children and youth.

Udruženje oboljelih od cerebralne paralize i distrofije Bosansko-podrinjskog kantona Goražde, is a citizens' association that provides support to persons with cerebral paralysis and muscular dystrophy.

Udruženje žena Maja Kravica from Bratunac with its cooperative Žena runs a social enterprise with various occupations, employing marginalised target groups

Centar za odgovornu demokratiju LUNA iz Rudo, also manages a social enterprises with various occupations, employing marginalised target groups, represent the newest formed Cooperative in the project.

2. Purpose and objectives of the consultancy

As the project is in its final phase of implementation, CARE is looking to engage a short term consultant(s) proficient in social entrepreneurship and NGO engagement, to facilitate a learning exercise – assessment of the project methodologies and their practical efficiency against the set project tasks.

The assessment is expected to combine a desk review of project documents and existing documents from various resources (official, civil society data, shadow reports, media reporting etc.), with qualitative and quantitative field data collection among the project target CSOs, their beneficiaries and stakeholders of importance for the implementation of the project (local, entity, national). Particular attention will be paid to the implemented project methodologies, as well as to the evident gender implications of project interventions. The assessment will particularly revolve around a central, self-learning participatory exercise: a two-days workshop gathering the representatives of CARE and the project target CSOs, with the main goal to review the used project methodologies and their effect on the partner organisations and their social enterprises, their beneficiaries and the social environment and identify lessons learned and recommendations to improve future programming.

The consultant(s) will be working in communication with CARE Project Manager and Program Coordinator of CARE's Socioeconomic Program, with inputs and feedback from the CARE Gender Program Advisor.

Project partners:



3. Scope

The Project methodologies and practice assessment will focus on extracting lessons learned from the project methodologies and identifying main challenges from their implementation, which will help with determining how future projects in this area could be made more relevant, impactful and sustainable. In their reporting, the assessment team is expected to provide a portrayal of the project achievements regarding the stability of the CSOs social enterprises, also in the wider context of the society of Bosnia and Herzegovina, having in mind the needs of the deprived populations for the state organised and CSOs offered social services.

The assessment will cover the main target groups, specifically, the 5 supported CSOs and their beneficiaries, located in Bratunac, Gorazde, Bijeljina, Modrica and Rudo in BiH.

The assessment and reporting will be conducted in the period July-August 2021 (the detailed evaluation schedule is described in the Timetable section below).

4. Methodology

The assessment will produce information, draw conclusions and make recommendations that are sufficiently valid and reliable based on data and analysis. The assessment will be conducted as a participatory process that will involve project target beneficiaries, partners/stakeholders, implementers, etc. Existing project documents, progress reports, various assessments etc. will be shared with the evaluator(s) to facilitate completion of the tasks.

The assessment will employ mixed methods-quantitative and qualitative approaches, including desk review, surveys, key informant interviews, focus group discussions, etc. methods that enhance participatory evaluation and learning. The consultant is expected to suggest the appropriate sampling method(s) which will be used in order to identify respondents and for the calculation of the representative sample size for field surveys.

- Desk review: The consultant(s) need to conduct a desk review of the following documents: project documents, reports, any other relevant documents, etc.
- Survey: The consultant(s) will conduct a survey assessing beneficiaries' satisfaction with the services provided throughout the project by each of the five target CSOs.
- Focus Group Discussions: The consultant(s) will conduct focus group discussions with key stakeholders to assess implementation experiences and effectiveness, document successes, challenges and lessons learned, and develop recommendations for improvement.
- Key Informant Interviews: The consultant(s) will visit various stakeholders and undertake key informant interviews using pre-designed checklists and get wide-ranging and in-depth feedback and learning. The visit will include selected project key stakeholders including relevant local government representatives.
- Participatory Learning Workshop (in local language): the consultant(s) will present key findings of the data gatherings and the data analysis and facilitate/moderate a participatory exercise which will include presentations, group discussions and reflections, as well as formulation of recommendations for future programming.

The assessment consists of:

1) Inception Phase

Project partners:



Contract, Kick-Off and Access to Data: Contract is signed and a discussion of the assessment takes place with the consultant teams. First documents, including project documents, log frame, progress reports, baseline, project Monitoring and Evaluation Matrix, assessment reports, etc. The inception phase includes:

Desk Review/Study: The consultant(s) studies all necessary project documents; re-constructs and analyses the intervention logic and its assumptions. Existing data needs to be analyzed and interpreted.

Detailed field assessment plan will be submitted to CARE Project Manager (in English, max 4 pages), where the consultant(s) will elaborate on how data will be obtained, analyzed and presented to the project team, including details of methodology, data collection tools, indicative targets to be included in the survey. The field trips will only take place upon official approval of the inception report by CARE.

2) Data Collection and Interview Phase

Data needs to be gathered, analyzed and interpreted. Interviews with selected beneficiaries and stakeholders are conducted on the spot - adjusting the data gathering methods to fulfil all protection measures related to the COVID-19 pandemic - or via Zoom in case of traveling and gathering restrictions linked to the COVID-19 pandemic. During the field data collection, the consultant(s) shall hold an independent briefing meeting with the appropriate project field staff; ensure adequate contact and consultation with, and involvement of, the different stakeholders. It is mandatory for the assessment report to include quantitative and qualitative data disaggregated by age, sex and vulnerability group.

3) Field data analysis, summary of findings

This phase is mainly devoted to the analysis of data, preparation of the field data analysis summary (in local language) for the team to provide feedback. The consultant(s)' focus will be on the project methodologies used, on the impact of project activities on partners' social enterprises and on their services for final beneficiaries. The data analysis and presentations shall include data disaggregated by sex, age and vulnerability status. As a result of the field data analysis, the consultant(s) will develop and submit an Assessment Summary of maximum 15 pages, excluding annexes, including review of the quantitative and qualitative data gathered around the project methodologies and analysis of their effectiveness, in particular on the CSOs' social enterprises and service provision for beneficiaries.

4) Central participatory workshop with the project team

The consultant(s) will integrate the findings of the field work and the analysis included in the Assessment Summary into a presentation of preliminary findings, which will be presented at the central two days workshop with CARE Balkans, and representatives of the target CSOs. The consultant(s) will present key findings of the data gatherings regarding the project implemented methodologies and their particular outputs, especially regarding partners' social enterprises and lead/facilitate/moderate group discussions and reflections regarding the efficiency of project processes. Finally, the consultant(s) will also facilitate the process formulation of recommendations for future programming.

5) Final Consultancy Report

The final draft report (in English) shall be submitted to CARE Project Manager (PM) both in hard and electronic copies, as per the reporting requirements (*Annex I*). On the basis of comments expressed by CARE's team, and collected by the focal person (the PM), the consultant(s) will amend and revise the draft final report.

After amending and revising the final draft report as per the comments of CARE, the consultant(s) will submit the final report in both hard and electronic copies, as per the reporting requirements (*Annex I*).

Project partners:

5. Deliverables

- Detailed field assessment plan of maximum 4 pages in English (excluding data collection tools) to be produced and submitted.
- Assessment Summary of maximum 15 pages, excluding annexes, including review of the quantitative and qualitative data gathered around the project methodologies and analysis of their effectiveness, in particular on the CSOs' social enterprises and service provision for beneficiaries. The report should be written in a reader-friendly style local language to serve as a preparation document for the central participatory workshop with the project team.
- Two days participatory workshop as a central participatory with the representatives of CARE and project partners – targeted CSOs. A Power Point Presentation will be prepared in local language by the consultant(s), summarizing the findings of the data collection and analysis for the workshop.
- Final Consultancy Report of maximum 30 pages (excluding annexes - structure attached in Annex I), in highest quality of written English, including a draft executive summary and the recommendations and taking due account of comments/feedbacks received from the participatory workshop with the team. The Final draft report should synthesize all findings and conclusions of the gathered data and information and will be the subject of CARE's approval process.

6. Workplan

A total of 20 working days is estimated for this assignment. The assessment shall be conducted over the period from 20th July to 27th September 2021. The following deadlines shall be met:

Action	Responsible	Date
Submission of bid	Consultant	19 th July 2021
Contract signing	CARE - Consultant	20 th July 2021
Detailed field assessment plan	Consultant	9 th August 2021
Assessment Summary	Consultant	31 st August 2021
Central participatory workshop	Consultant - CARE	8-9 September 2021
Final Consultancy report	Consultant	27 th September 2021

7. Evaluation Management - CARE's Responsibilities

- Provide necessary information and documentation on the project.
- Coordinate with partner organisations and the Consultant during the entire preparation and realisation of the task.
- Provide logistical support to the Consultant necessary for the realisation of the tasks, other than travel logistics. Travel and accommodation costs for the fieldwork envisaged should be included in the Consultants' bid.

Project partners:

- Review of the inception report, preliminary assessment report and final consultancy report and timely provision of feedback for its completion.

8. Required qualification of the Consultant:

CARE invites individual experts, expert teams, NGOs and agencies, experienced in project evaluations in the context of a CSOs development project, to submit their bids and present in details their relevant expertise, experience, division of work and responsibility levels/responsible persons (in case of teams or agencies).

The successful candidate will have:

- Relevant University degree in social sciences, economics, or similar, with at least 5 years of experience in work with the non-government sector in Bosnia and Herzegovina.
- Excellent knowledge and experience in data assessments of at least five years. Documented experience and qualification in research (qualitative and quantitative) and analysis.
- Excellent knowledge of CSO scene in Bosnia and Herzegovina. Demonstrated experience in working with authorities in BiH at all levels (local, regional, entity, cantonal and State).
- Demonstrated knowledge of the BiH social system and alternative models of social protection and services. Good acquaintance with the economic situation in the project region. Excellent knowledge of key principles of social/cooperative entrepreneurship and/or direct long-term involvement will be regarded as asset.
- Excellent knowledge of English and local languages, highest standard of written English.
- Good presentation and facilitation skills, excellent workshop techniques.
- Clear demonstration that the consultant(s) is able to meet the consultancy task in the envisaged timeframe.

9. Specifications for the submission of offers

1. Consultant's Curriculum Vitae (preferably in EU format) and professional portfolio, with detailed information relevant to the required qualifications.
2. Suggested approach and methodology
3. Implementation plan (schedule) for the consultancy.
4. Bid/financial offer: The Consultant shall suggest a daily fee/rate in BAM per consultancy day. Transportation, food, accommodation and any other expected costs should be included. There is no standard format for the bid.
5. Appendix 1 – filled in Identification Form (form provided by CARE).

Bid evaluation:

The received applications will be evaluated against the following criteria:

Project partners:

REFERENCE/EXPERIENCE (consultant(s)' experience with similar tasks /subject)	METHODOLOGY/APPROACH (effectiveness of the planned methodology for the task)	KNOWLEDGE /SKILLS (relevant to the tasks)	BID (value for money)
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Payment schedule:

First payment 25% of contracted amount, not later than 31st July	Upon the submission and adoption of the Inception Report.
Second-Final payment (75% of contracted amount)	Upon the approval of the Consultancy report by CARE

The detailed payment schedule will be outlined in the Consultancy Contract. The Payment will be carried out in line with all necessary documentation as per CARE's administrative procedures (time sheets, consultancy report, etc).

THE APPLICATION BID MUST BE SUBMITTED IN ENGLISH!

Interested candidates are invited to apply to:

Via post to

**CARE International, Balkans,
Hasana Kaimije 11, 71000 Sarajevo**

OR via email to:

shalkic@care.ba

Closing date for application submission is **July 19th, 2021, 15:00 (CET)**.

We thank all applicants for their interest. Only selected applicants will be contacted.

For any additional information concerning the application, please contact:

Branislav Tanasijevic, Project Manager – btanasijevic@care.ba

In Sarajevo, 28th June 2021

Annex I: Layout, Structure of the Report

The draft and/or final report should not exceed 30 pages, excluding executive summary and annexes. The layout, structure of the draft and/or final report of the main sections of the evaluation report are as follows:

Title Page

Acknowledgments, acronym, table of content, list of tables and figures

1. Executive summary (max 1.5 page)

Project partners:



UDRUŽENJE OBOGLEDJELIH OD
CEREBRALNE PARALIZE I DISTROFIJE
Bosansko-podrinjski kanton Goražde

2. Introduction, Background and Context Analysis (max 2.5 pages)

- Background of the project
- Relevance of the evaluation/the problem statement
- Objective of the evaluation

3. Lessons Learnt and Recommendations (max 3 pages)

4. Findings (max 19 pages)

5. Visibility (max 1 page)

6. Assessment Design and Approach (max 2 pages)

6.1 Methodological Approach

6.2 Data Collection and Analysis Tools

6.3 Limitations, Risks and Mitigation Measures

7. Conclusions (max 1 page)

8. Annexes to the report

The report should include the following annexes:

Questionnaires, other data collection tools used within the final evaluation process.

List of persons/organizations consulted

Literature and documentation reviewed

Project partners: