

## Terms of Reference (ToR) for Final Evaluation

**Project Title:** SOCIETIES 2 - Support Of CSOs In Empowering Technical skills, Inclusion of people with disabilities and Eu Standards in Western Balkans

**Country:** Albania, Bosnia Herzegovina, Kosovo\*<sup>1</sup>, Montenegro, Serbia

**Project Number:** 2020/414-634

**Leading partner:** Caritas Serbia

**Implementing partners:** Civic Initiatives, Caritas Bosnia and Herzegovina, Association of parents of children with special needs “Vedri Osmijeh”, Caritas Kosovo, Centre for interdependent living Kosovo, Caritas Montenegro, Association of Paraplegics from Bar, Caritas Albania, Progetto Speranza (Project Hope).

**Duration of the project:** 4 years (01.04.2020-31.03.2024)

**Budget of the project:** 1.111.055,90 EUR

### Introduction/Background

The Action aims at strengthening the CSOs in 5 Western Balkans countries supporting their participation in public dialogue with the Public Authorities and their influence on the decision-making process. The Action is designed to increase their expertise and capacities in social inclusion policies of people with disabilities and/or mental disorders (*hereinafter: PWDs*), in line with the EU standards and the pre-accession process of those countries.

The Action is proposed by Caritas Serbia as the Lead Applicant and coordinator of an alliance for social inclusion, composed by 9 other CSOs in the region. **Four Co-Applicants** belong to Caritas network and have worked together on different projects, sharing common values, joint mission and strategies.

The alliance is enriched and strengthened by **other five Co-Applicants** working in the field of social inclusion of PWDs: Progetto Speranza (Project Hope, Albania); Association of parents of children with special needs “Vedri Osmijeh” from Mostar (BiH); Association of Paraplegics, from Bar (Montenegro); Centre for interdependent living, from Kosovo; and Civic Initiatives (Serbia). The Action has also relied on the support of **two optional Co-applicants**: Caritas Italiana (Italy) (share the best EU practices in de-institutionalization and its expertise in support CSOs advocacy);

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<sup>1</sup> Hereinafter, concerning Kosovo: This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Caritas Bulgaria (Bulgaria) who offers its know-how in EU accession process and transformation of services for PWDs.

The consortium created the Action on the **capitalization of past and ongoing activities** in similar fields of work. In fact, it is called “SOCIETIES 2” as it represents the continuation, extension and upgrade of the regional project SOCIETIES<sup>2</sup>, implemented in the same 5 countries, with the involvement of most of the Co-applicants. The partnership relies also on the support as **Associates** of Local Authorities and Institutions cooperating with the consortium members.

### **Objectives of the action**

The goals of the Action are inspired and fully in line with the general strategy of the EU for the enlargement<sup>3</sup>: *“achieving an environment that is conducive to civil society activities and building the capacities of CSOs to be effective and accountable independent actors”*. The Action aims at contributing to the achievements of those EU goals, in the field of de-institutionalization and social inclusion of PWDs.

The **overall objective** of the Action will be reached through the development of set of activities aiming to strengthen overall CSOs capacities, increasing their autonomy, representativeness, accountability and effectiveness in promoting and advocating (**specific objective 1**). In addition, the Action intends to foster a conducive environment in the region, by creating structures and mechanisms for cooperation, exchange of experiences, partnership and social dialogue between the CSOs and the local Public Authorities for social inclusion of PWDs (**specific objective 2**).

**Target groups** in the project are grass **root CSOs** in the field of disability and mental health and **Public institutions** in 5 IPA countries.

### **Final beneficiaries:**

- **Persons with disabilities and mental disorders**
- **Civil societies** in 5 countries of the Western Balkans

### **Outputs:**

- 1.A** Capacities of CSOs for PWDs have been developed
- 1.B** Initiatives for social inclusion of PWDs became more efficient
- 2.A** The quality and efficiency of social policy dialogue between CSOs and government bodies have been increased
- 2.B** Increased public perception of the contribution given by CSOs in promoting the process of social inclusion of PWDs

For **more information** please refer to the **project documents** that will be made available upon assignment.

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<sup>2</sup> Project “SOCIETIES - Support Of CSOs In Empowering Technical skills, Inclusion of PWDs and EU standards in South East Europe” (2016-2019, contract nr. 2015/370-229), granted through Civil Society Facility and Media Programme 2014-2015 - Support to regional thematic networks of CSOs

<sup>3</sup> DG Enlargement, Guidelines for EU support to civil society in enlargement countries 2014-2022

## 1. Purpose

Caritas Serbia is looking for **external evaluator** to carry out external evaluation of the project SOCIETIES in order to objectively determine the fulfilment of the goals (outputs, outcomes), efficiency, effects, impact and sustainability of the intervention, as well as formulating lessons learned and recommendations. The learning results of this evaluation will serve also as a guidance in developing future projects and programs in the respective field in the targeted countries.

## 2. Approach and Methods

The evaluation/review consists of several phases:

Contract and Kick-off meeting: Contract is signed and a discussion of the assignment takes place. First documents, including available data, are provided to the evaluation team.

Desk Study: The evaluation/review team studies all necessary project/programme documents; re-construct and analyse the intervention logic/programme theory and theory of change and its assumptions. Existing data needs to be analysed and interpreted.

Inception-Phase: In the inception report the evaluators will describe the design of the evaluation and will elaborate on how data will be obtained and analysed. The use of a data collection planning worksheet or a similar tool is required.

The field trip will only take place upon official approval of the inception report by the contractor.

Interviews: Data needs to be gathered, analysed and interpreted. It is expected that the evaluation will include quantitative and qualitative data disaggregated by sex.

Final Draft Report: Submission and presentation of final draft report, inclusion of comments from partners and contractor.

Final Report: Submission of final report, **see reporting requirements under point 5.**

## 3. Timetable

| Action                                      | Responsible   | Date                      |
|---|---|---------------------------|
| Submission of bid (electronically)          | Contractor  | 30.11.2023                |
| Contract signed and documents provided      | Contract signed between service provider and consultant | 15.12.2023                |
| Kick-Off meeting                            | Meeting between contractor and consultant               | Up to 30.12.2023          |
| Desk Study and Consultations                | Consultant  |                           |
| Submission of final inception report        | Consultant  | Mid January               |
| Field Visit, interviews etc. and feedback   | Consultant  | January and February 2024 |
| Submission of final draft report            | Consultant  | March 2024                |
| Inclusion of feedback in final draft report | Contractor  | Mid April 2024            |

|   |            |            |
|---|------------|------------|
| Submission of final evaluation report (hard copy and electronic copy) to contractor | Consultant | April 2024 |
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#### 4. The Evaluation requirement

Key Qualifications should be:

- Relevant academic degree in social sciences and/or education
- Conducted at least three evaluations in the last five years, ideally in the relevant field
- Expertise and experience on the human rights-based approach, gender responsive approaches and other areas of expertise as relevant to the specific programme or project
- Expertise and experience in the field of inclusion of vulnerable groups, esp. people with disabilities and knowledge of universal accessibility as guiding principle
- Knowledge of the background and actual developments in the region with focus on social topics
- Experience in project cycle management
- Experience in project level evaluations
- Familiarity with donor funded projects
- Experience preparing and analysing a theory of change
- Experience in social science methods
- Excellent oral and written English skills, knowledge of local languages of the project countries is an asset
- Sound MS Office and IT skills

**The consultant must not have been involved in the design, implementation or monitoring of this project; and respects the ethical standards and guiding principles for evaluation, including impartiality and independence.**

#### 5. Reports

The consultants will submit the following reports:

- an inception report (10-15 pages without annexes),
- a final draft evaluation report (about 25-30 pages without annexes), including a draft executive summary
- and the final evaluation report (25-30 pages without annexes), the final executive summary.

All reports need to be written in English.

The executive summary should summarize key findings and recommendations (three to five pages) and needs to be submitted as part of the final draft report.

The findings and recommendations of the draft final report and final report have to be structured according to the evaluation questions. An outline of the report's structure needs to be agreed upon during the inception phase.

## 6. Co-Ordination

Ms. Jelena Ankić will be the contact person for this evaluation/review.

Contact details: [jelena.ankic@caritas.rs](mailto:jelena.ankic@caritas.rs), +381.11.4099.561.

## 7. TERMS OF APPLICATION

The **deadline** for the submission of the application is the **30<sup>th</sup> of November 2023**.

Maximum amount available for the service (including all costs): **8.000 EUR**.

Applications should include:

- CV
- Cover Letter: max 300 words
- Financial and Technical Offer<sup>4</sup>: Concept Note not exceeding 3 pages describing the approach and suggestions for the evaluation; including the number of estimated working days and price of the service (all costs included).

**Qualified candidates should send the requested documents to Caritas Serbia ([jelena.ankic@caritas.rs](mailto:jelena.ankic@caritas.rs)).**

Applications that do not include all the required documents will be disqualified. Applications received after the deadline will not be accepted.

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<sup>4</sup> The award criteria are best value for money in the case of tenders for services.